IBM Center for The Business of Government

Making Federal Agencies Evidence-Based:

The Key Role of Learning Agendas

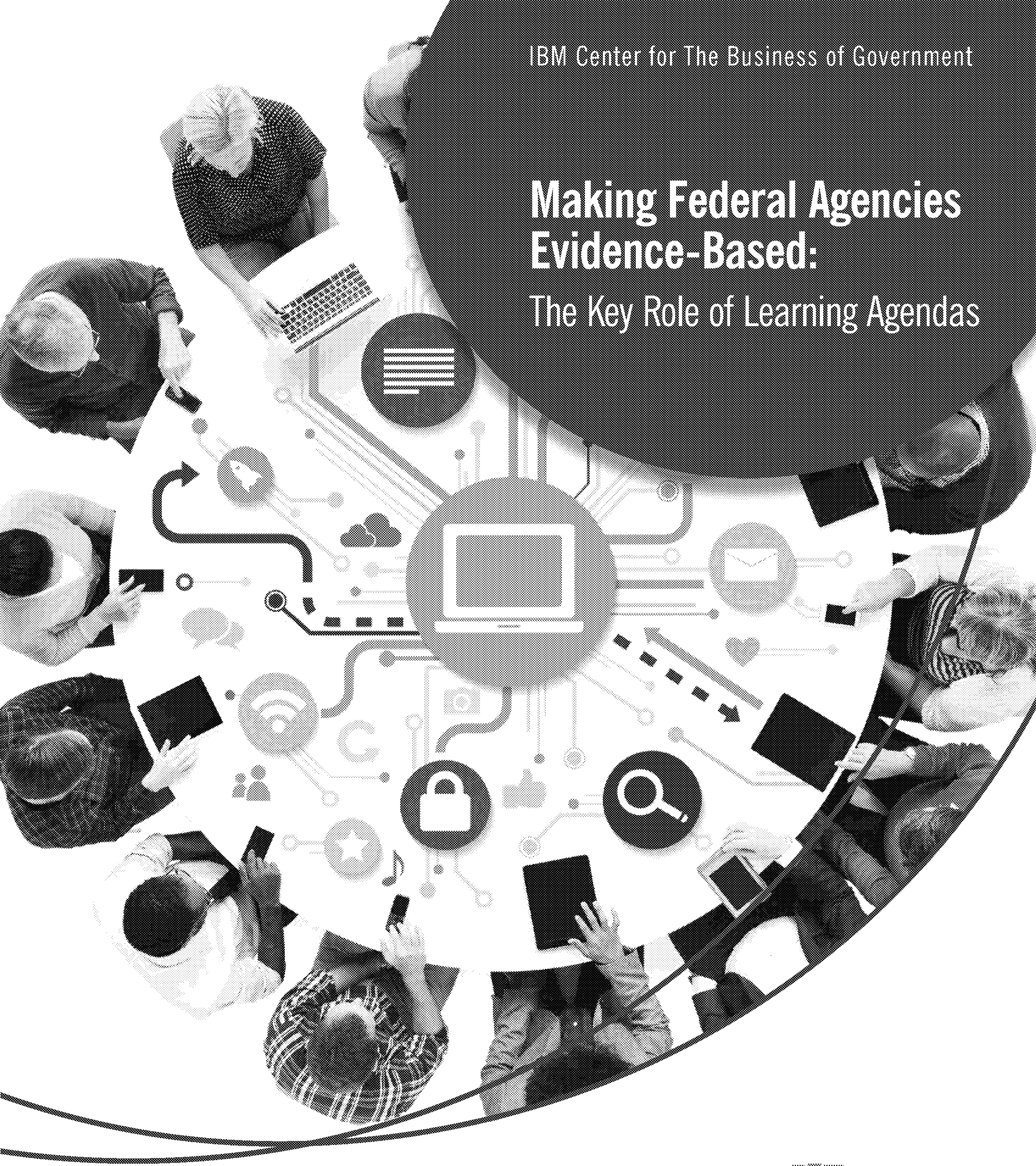

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TABLE OF CONTENTS

Foreword 4

Executive Summary 5

Introduction 6

The Rationale Behind the Federal Government's New Learning Agenda Requirement 9

Emerging Practices for Successful Development of Learning Agendas in U.S. Federal Agencies 15
  Pre-conditions to Consider for Effective Learning Agenda Development Processes 16
  Benefits of Developing and Using an Organizational Learning Agenda 21
  Potential Challenges Developing Useful Learning Agendas 24

The Learning Agenda Design Sprint (LADS): A User-Centered Model 26
  Bridging the Gap between Users and Producers of Evidence 27
  Questions to Ask Before Conducting a Learning Agenda Design Sprint 30
  The Seven Steps in Conducting a Learning Agenda Design Sprint 32

Recommendations 43

Conclusion 45

Acknowledgements 46

Appendices 47

References 49

About the Authors 51

Key Contact Information 53

Reports from the IBM Center for The Business of Government 54

FOREWORD

On behalf of the IBM Center for The Business of Government, we are pleased to present this report, *Making Federal Agencies Evidence-Based: The Key Role of Learning Agendas,* by Kathryn Newcomer, George Washington University; Karol Olejniczak, SWPS University of Social Sciences and Humanities, and Nick Hart, the Data Foundation.

DANIEL J. CHENOK

LEANNE HASELDEN

The Biden-Harris administration has quickly put down markers that it will be evidence-based and data-driven in its decision making. The Foundations for Evidence-Based Policymaking Act of 2018 does just that. A key provision in that law requires each federal agency to develop a strategy plan for how they would conduct their research and evaluation efforts, commonly called "learning agendas."

But what does a learning agenda look like and how should agencies go about developing one? This report describes emerging practices developed in recent years by pioneering agencies such as the Departments of Labor and Housing and Urban Development. It shows how they identified their learning needs and devised a shared strategy to address those needs.

The authors describe a user-centered design sprint approach for developing a learning agenda that attempts to bridge the gap between research users, such as policymakers, and the producers of evidence in order to ensure results are more relevant and meaningful to decision makers.

The authors conclude with recommendations to agency evaluation officers, the Office of Management and Budget, and the Congress to ensure the upcoming first wave of federal agency learning agendas will be seen as useful and actionable.

The insights and steps for building a learning agenda that are described in this report, however, are not exclusive to the federal government. States and localities can use the steps detailed in following pages to develop their own.

While this report is targeted to U.S. federal agencies, we hope it provides leaders at all levels of government a useful set of actions that they could undertake in order to improve service delivery, make better decisions about resource allocation, and operate more seamlessly in serving citizens.

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EXECUTIVE SUMMARY

Learning agendas present a tool to be used as one aspect of organizational strategic planning that specifically focuses on the generation of relevant knowledge for decision makers, organizational leaders, and stakeholders.

A learning agenda is sometimes described as a strategic evidence-building plan for the research and evaluation activities of federal agencies. However, it can be much more than that in practice. An inclusively-and strategically-developed learning agenda provides a list of important questions and the plans for addressing the questions that balances the interests, informational needs, and time horizons for different organizational decision makers. The learning agenda, or evidence-building plan, presents a coherent strategy for recognizing and prioritizing approaches to fill unmet information gaps so decision makers, managers, and stakeholders have access to the information they want when they need it.

In this report, we describe emerging practices for successful development of learning agendas in federal agencies. We also provide and explain how to implement a model to facilitate meaningful stakeholder engagement in the development of learning agendas—the Learning Agenda Design Sprint (LADS). LADS is a user-centered model grounded in empirical research on organizational learning and knowledge brokering that can be conducted in-person or virtually.

We offer five recommendations regarding development and use of learning agendas in U.S. federal agencies going forward:

Recommendation 1
Congress should provide federal agencies flexibility to agencies to develop their learning agendas after the quadrennial strategic planning process has been finalized, not concurrently.

Recommendation 2
Congress, the president, and senior agency leaders should prioritize allocating resources for learning needs and evidence-building activities.

Recommendation 3
The Office of Management and Budget should update guidance to direct agencies to publish learning agendas publicly.

Recommendation 4
Agency evaluation officers should strategically involve stakeholders when developing learning agendas using proactive engagement approaches tailored to the agency ecosystem.

Recommendation 5
Federal agency evaluation officers should consider using the Learning Agenda Design Sprint model in order to more effectively engage stakeholders when developing learning agendas.

INTRODUCTION

Over the past 50 years, new and innovative approaches for improving government programs and operations have been adopted and applied around the world with mixed success.

In the U.S. federal government, much of this attention has focused on devising planning processes and goal-setting activities in agencies that align with emerging priorities and needs in public administration and society.[1] Historically, many efforts were challenged by the routinization and compliance orientation with the planning activities, limiting their usefulness in practice.

Learning agendas, or evidence-building plans, present an opportunity to address long-standing gaps in existing planning processes for organizational improvement. Learning agendas are intended to transparently align current and future learning needs in agencies with intentional efforts to improve service delivery, policy implementation, and agency performance. Yet, as a relatively new planning process and type of activity for organizations around the world and in the United States, there is still much to be learned and improved upon in the learning agenda development process itself.

What is a learning agenda?

A learning agenda, or evidence-building plan, is comprised of a set of prioritized questions about evidence needs to inform future decision making in an organization. The questions and analytical approaches to address the questions are collaboratively developed by organizational leaders, staff, and stakeholders. The agenda clarifies how and when priority questions will be addressed to provide findings useful to organizational leaders for informing decision making and improvement of an agency's effectiveness.

At its core, a learning agenda is simply a set of questions. The questions are prioritized to align with organizational strategic goals and activities, while presenting an honest perspective about what is known and what is not known to address those questions. The process of identifying the information gaps to promote learning should be developed in a collaborative fashion, by engaging a variety of program staff and stakeholders. These would include senior leaders in agencies, evaluators, data experts, external researchers, program beneficiaries, policymakers, and other relevant interests.

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[1] Newcomer, K. and C. Brass (2021) "Approaches to Improving Performance in Government: Making Sense of Where We've Been and What's Next?" in Marc Holzer, (Editor) *Public Productivity and Performance Handbook,* 3rd ed. New York, NY: Routledge Publishing.

In addition to identifying a list of questions, a core feature of the learning agenda is that it clarifies how and when the questions will be addressed, with the intent to provide findings useful to organizational leaders for decision making and improvement of an agency's effectiveness in a timely fashion.

Engaging stakeholders in the process of identifying and formulating the questions is a critical element, as the engagement process provides a means to strategically institutionalize learning. Drawing from tools used to plan and manage projects in the educational and business fields, the concept has become linked to the idea of "learning organization," a term popularized by Peter Senge's work.[2] Developing a learning agenda provides an opportunity for aligning expectations, setting priorities, and promoting real, lasting learning in agencies at all levels of government. However, this report focuses on the development within U.S. federal agencies, given their specific, near-term needs to develop such agendas.

What Does Developing and Using a Learning Agenda Entail?

Developing a learning agenda is one aspect of organizational strategic planning that specifically focuses on the creation of relevant knowledge for decision makers, organizational leaders, and stakeholders. A learning agenda is sometimes described as a strategic evidence-building plan for the research and evaluation activities of federal agencies. However, it can be much more than that in practice. An inclusively- and strategically-developed learning agenda provides a list of important questions and the plans for addressing the questions that balances the interests, informational needs, and time horizons for different organizational decision makers. The learning agenda, or evidence-building plan, presents a coherent strategy for recognizing and prioritizing approaches to fill unmet information gaps so decision makers, managers, and stakeholders have access to the information they want when they need it.

Many agencies struggle to calibrate and align expectations between those producing data and evaluation studies and the eventual users of this information. Decision makers need information at the point decisions are made, which may not be consistent with the availability of different types of data or studies, the scope of the existing information, or the specificity needed to address a particular topic. The ultimate goal is to ensure relevant information is available for key decision makers when it can also be useful, and therefore used. This involves calibrating data and evidence availability with the real-time pressures, substantive coverage, and alignment to the specific questions or topics demanded.

A learning agenda can cover a broad scope of topics while also offering specific details about ongoing or planned activities to fill information gaps. A learning agenda identifies organizational objectives, ideally in sync with the agency's strategic plan. Developing a learning agenda entails recognizing and supporting key program stakeholders with relevant knowledge and perspectives relevant to mission achievement. The agenda delineates a specific, priority set of short- and long-term questions about policies, activities, or services, and may focus on measurement of both implementation and attainment of anticipated outcomes. A learning agenda identifies the data, methods, and resources needed to either gather relevant evidence or produce new evidence to address the questions. The agenda also provides a transparent opportunity for ongoing feedback on knowledge need and even, when appropriate, reprioritization of those information needs to reflect emerging issues.

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[2] Senge, P. M. (1990). *The Fifth Discipline: The Art & Practice of The Learning Organization.* New York: Currency Doubleday.

In sum, developing a learning agenda is a strategic approach for producing a meaningful, stakeholder-informed plan for how organizational decision makers work together to develop key questions, and learn how those evidence-building priorities will be specifically and systematically addressed. In turn, the organization is provided with a dynamic research agenda to determine what works, when, and how.

When done effectively, developing a learning agenda holds promise to both address longstanding challenges in promoting learning cultures, but also for advancing the promise of more evidence-informed policy and meaningful performance improvements. With the promise of the approach clear at a theoretical level, what remains unclear is how federal agencies and staff leading the development process can and should arrange the activities to ensure the process is meaningful, realistic, and useful. This report contributes to the rapidly growing research on how learning agendas can be produced, emerging practices and strategies for adopting the approach, and ultimately how federal leaders and staff can practically implement the process of designing a learning agenda.

The report first provides background about the motivation for using learning agendas in U.S. federal agencies, and some history about how these agendas became a requirement in federal law. The report next presents an overview of emerging practices in U.S. federal agencies, including lessons based on the experiences of federal agencies that pioneered learning agendas prior to the statutory requirement. It also elaborates on benefits and challenges in the development process for learning agendas. Then, the report describes the development and piloting of the Learning Agenda Design Sprint model, which is an innovative, game-based approach for designing learning agendas and the results of pilot tests in public and nonprofit organizations in the U.S. and Europe. This model for developing learning agendas holds promise for not only strengthening evidence-based insights, but also ensuring the user-centered design is salient for users in federal agencies.

The Rationale Behind the Federal Government's New Learning Agenda Requirement

Marketing
GO ONLINE!
VIRAL!
Team
2
Support IT
1

In 2017, a blue-ribbon panel of experts appointed to the U.S. Commission on Evidence-Based Policymaking unanimously issued a set of findings that considered challenges facing the federal government in its use of data to inform policymaking.[3] The findings were also paired with a series of specific recommendations that addressed how agencies could improve access to their data, strengthen privacy protections to keep certain data confidential, and for expanding government's capacity to learn and improve over time.

The commission's recommendations about capacity stressed the need for senior leaders in government agencies to recognize their role in encouraging the production of evidence, but also a key role in ensuring evidence was useful and usable. The commission identified key functional gaps that existed in government today—and recommended immediate steps be taken to address those gaps. Among other recommendations, the commission specifically encouraged federal agencies to develop learning agendas.[4]

The commission perceived that the lack of coordination among different parts of agencies for connecting data collection, data management, and data analysis activities could be addressed by facilitating a periodic process to ensure agencies were planning for key questions about major policies to be routinely addressed. The commission explicitly critiqued the lack of integrated approaches in most agencies for facilitating planning around evidence-based policymaking needs. In the commission's perspective, the learning agenda could serve the role as a strategic plan for agencies' policy research and evaluation activities.

The Evidence Commission's research identified a number of agencies that had already developed and implemented learning agendas. Where they existed, such as at the U.S. Department of Labor and the U.S. Department of Housing and Urban Development, agency staff worked with stakeholders and senior leaders to identify the most pressing policy problems facing the agencies, outlined the questions and knowledge gaps that remained for addressing those problems, and articulated insights about what data and analysis would be most relevant for future decisions.

The commission's recommendation also recognized that the development of a learning agenda need not occur with high frequency, but rather that a multi-year approach—accompanied with an easy refreshing process—could suffice for achieving the goals about coordination and integration of the evidence community. To the extent the agendas are made publicly available, according to the commission, they also provide useful knowledge to researchers and analysts outside government about the needs government officials have to make future decisions—decisions that often could result in cost-effective policy research from the government perspective.

Shortly after the commission issued its final report in 2017, bipartisan legislation was filed and advanced through the U.S. Congress that included a requirement for the largest federal agencies to develop learning agendas. The Foundations for Evidence-Based Policymaking Act of 2018 (Evidence Act) became law in early 2019 and mandated agencies develop the plans in conjunction with their quadrennial strategic planning processes.[5]

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[3] U.S. Commission on Evidence-Based Policymaking. *The Promise of Evidence-Based Policymaking: Final Report of the Commission on Evidence-Based Policymaking*. Washington, D.C.: GPO, 2017.

[4] See Recommendation 5-2 in CEP Final Report, 2017.

[5] U.S. Congress (2018). P.L. 115-435, Foundations for Evidence-Based Policymaking Act of 2018. (approved: January 14, 2019). H.R. 4174. 115th Congress, 1st Session.

The Evidence Act calls the learning agenda an "evidence-building plan," but the concept is the same. The law requires that agencies articulate policy-relevant questions, identify data needs, describe potential analytical methods needed, explicate any legal barriers for the research, and denote how the agency will go about filling the knowledge gap. In parallel, the law requires agencies to establish annual evaluation plans in which the agencies disclose what evaluations are to be undertaken along with details about data collection activities. It also requires agencies to self-assess their "capacity to support the development and use of evaluation."

The law relied on the logic for producing learning agendas that came out of the Evidence Commission.[6] In other words, Congress and the president agreed that agencies need to better coordinate their evidence planning and that the learning agenda was a construct that could encourage the community to coalesce around a unified strategic direction. That said, the law affords agencies considerable flexibility to determine how to best implement plans that meet individual agency needs.

In 2019, the White House's Office of Management and Budget (OMB) issued initial implementation guidance for federal agencies in implementing some provisions of the Evidence Act, including how to develop interim learning agendas, annual evaluation plans, and capacity assessment in 2020 and final documents in 2022 (see Exhibit 1).[7] The guidance specifies an expectation, consistent with the legal framework, that the plans align with strategic planning activities and focus on multiyear learning priorities. OMB's guidance, however, did not specify a particular format, length, level of detail, or structure. OMB's choice not to take an overly constrictive approach suggests an expectation from the White House that each agency can and should develop a unique plan that suits its needs, as opposed to following a one-size-fits-all formula.

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[6] House Report 115-411 (2017). Foundations for Evidence-Based Policymaking Act of 2017. (Committee on Oversight and Government Reform) Accessed at: https://www.congress.gov/congressional-report/115th-congress/house-report/411/1?overview=closed; Hart, N. (2019). Entering the Evidence Promised Land; Making the Evidence Act Law. In Evidence Works: Cases Where *Evidence Meaningfully Informed Policy.* Eds. N. Hart and M. Yohannes. Washington, D.C.: Bipartisan Policy Center, pp. 192-204.

[7] See OMB (2019). M-19-23, "Appendix B: Further Guidance on Learning Agendas." Accessed at: https://www.whitehouse.gov/wp-content/uploads/2019/07/M-19-23.pdf.

Exhibit 1: Requirements for Agencies to Develop Learning Agendas, Annual Evaluation Plans, and Agency Capacity Assessments

Requirement	Definition in Evidence Act
Learning Agenda (Agency Evidence-Building Plan)	A systematic plan for identifying and addressing policy questions relevant to the programs, policies, and regulations of the agency. Such plan shall contain the following: 1. A list of policy-relevant questions for which the agency intends to develop evidence to support policymaking 2. A list of data the agency intends to collect, use, or acquire to facilitate the use of evidence in policymaking 3. A list of methods and analytical approaches that may be used to develop evidence to support policymaking 4. A list of any challenges to developing evidence to support policymaking, including any statutory or other restrictions to accessing relevant data 5. A description of the steps the agency will take to accomplish paragraphs (1) and (2) 6. Any other information as required by guidance issued by the (OMB) director
Annual Evaluation Plan	An evaluation plan describing activities the agency plans to conduct pursuant to subsection (a) of this section during the fiscal year following the year in which the performance plan is submitted. Such plan shall: 1. Describe key questions for each significant evaluation study that the agency plans to begin in the next fiscal year 2. Describe key information collections or acquisitions the agency plans to begin in the next fiscal year 3. Describe any other information included in guidance issued by the director under subsection (a)(6)
Capacity Assessment	An assessment of the coverage, quality, methods, effectiveness, and independence of the statistics, evaluation, research, and analysis efforts of the agency, including: 1. A list of the activities and operations of the agency that are currently being evaluated and analyzed 2. The extent to which the evaluations, research, and analysis efforts and related activities of the agency support the needs of various divisions within the agency 3. The extent to which the evaluation research and analysis efforts and related activities of the agency address an appropriate balance between needs related to organizational learning, ongoing program management, performance management, strategic management, interagency and private sector coordination, internal and external oversight, and accountability 4. The extent to which the agency uses methods and combinations of methods that are appropriate to agency divisions and the corresponding research questions being addressed, including an appropriate combination of formative and summative evaluation research and analysis approaches 5. The extent to which evaluation and research capacity is present within the agency to include personnel and agency processes for planning and implementing evaluation activities, disseminating best practices and findings, and incorporating employee views and feedback 6. The extent to which the agency has the capacity to assist agency staff and program offices to develop the capacity to use evaluation research and analysis approaches and data in the day-to-day operations.

The recognition for agency flexibility in OMB's implementation guidance, paired with the theory offered by the Evidence Commission and the congressional intent documented from consideration of the Evidence Act, suggest a clear path for developing and sharing learning agendas. The Evidence Commission relied on the examples from Labor and HUD as models in developing the construct. Both were iterative, participatory processes that highlighted high-level information needs. Both were periodically updated and ensured buy-in from political and career leaders in agencies, as well as program stakeholders and beneficiaries.[8] In fact, the Evidence Commission suggested that learning agendas should be collaboratively produced and include participatory feedback and dialogue.[9] After the commission issued its report in 2017, and before the law was enacted in 2019, the Small Business Administration issued a learning agenda, and even benefited immediately from researchers reaching out for access to administrative records at the agency to help answer core questions.[10]

In practice, given the heterogeneity of agency sizes and structures, how agencies go about developing and disseminating learning agendas will necessarily vary. Small agencies, like the Small Business Administration, may be fully capable of developing a single unified plan. Large departments, like the Department of Defense, may need program-specific plans that are later aggregated in some form to an agencywide agenda.[11]

Moving forward, the risks to agencies producing high-quality, useful learning agendas are real. Past initiatives like the Government Performance and Results Act of 1993 (GPRA), the GPRA Modernization Act of 2010, and other governmentwide mandates tend to materialize in a compliance mentality.[12] Success will likely require motivated leaders who acknowledge simply "checking the box" to develop an agenda is neither cost-effective nor useful. New leadership positions established by the Evidence Act for evaluation officers and chief data officers may contribute to changing the attitudes and cultural approach to developing a learning agenda in agencies where it did not exist prior to the legal mandate.

Hart and Newcomer (2018) offer four key characteristics of performance and evidence initiatives that may help to mitigate a compliance mentality and promote improvement:

- Calibrating activities to encourage learning as a central focus and rationale
- Coordinating across various units that may otherwise not engage or participate
- Sustaining audiences of contributors to focus on achieving useful strategies for improvement
- Planning and resourcing implementation carefully—as well as publicly sharing successful uses

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[8] Nightingale et al. (2018) "Evidence Toolkit: Learning Agendas." Report. Washington, DC: Urban Institute. Accessed at: https://www.urban.org/sites/default/files/publication/97406/evidence_toolkit_learning_agendas_2.pdf.

[9] Hart, N. and S. Martinez. (2017) "Recommendation Memo #7: Enhancing Collaboration in the Federal Evidence Ecosystem." Report. Washington, D.C.: U.S. Commission on Evidence-Based Policymaking. Accessed at: https://www.datafoundation.org/s/Compendium-of-CEP-Staff-Decision-Memos-1.pdf.

[10] Bipartisan Policy Center/Urban Institute. (2018) Building Evidence and Learning Agendas in Federal Agencies. Event: https://bipartisanpolicy.org/events/building-evidence-and-learning-agendas-in-federal-agencies/.

[11] Hart and Martinez, 2017.

[12] Hart, N. and K. Newcomer (2018). Presidential Evidence Initiatives. Report. Washington, D.C.: Bipartisan Policy Center. Accessed at: https://bipartisanpolicy.org/wp-content/uploads/2019/03/Presidential-Evidence-Initiatives.pdf.

As a new mandate, agencies will need to be mindful of how to avoid assuming a compliance mentality to make their learning agendas useful and relevant over time, and sustainable through leadership changes. As shown in Exhibit 2 below, agencies were required to submit their first draft of interim learning agendas to OMB by September 2020 for comments and review, along with draft annual evaluation plans and a self-assessment of their capacity to deliver on what is in their plans. They are scheduled to submit a draft of their first complete learning agendas to OMB in September 2021, again, along with final evaluation plans and capacity assessments. All three of these documents are to be publicly-released for the first time along with the president's fiscal year 2023 budget proposal, due to Congress in February 2022.[13]

Exhibit 2: Timetable of Developing Agency Learning Agendas, Annual Evaluation Plans, and Agency Capacity Assessments

Evidence Act Requirement	Date Due to OMB
1. Interim Learning Agenda 2. Draft 2022 Annual Evaluation Plan 3. Interim (evaluation) Capacity Assessment	September 2020
Final FY 2022 Annual Evaluation Plan	January 2021
1. Updated Learning Agenda 2. Initial Draft Capacity Assessment	June 2021
1. Full Draft Learning Agenda 2. Draft FY 2023 Annual Evaluation Plan	September 2021
1. Final Learning Agenda 2. Final Capacity Assessment	December 2021
Final Draft FY 2023 Annual Evaluation Plan	January 2022
1. Final Learning 2. Final Agenda Capacity Assessment 3. FY 2023 Annual Plan	February 2022

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[13] Office of Management and Budget (July 2020). Circular No. A-11, "Preparation, Submission, and Execution of the Budget," Part 6, Sections 290.16. Washington, D.C.: GPO. Accessed at: https://www.whitehouse.gov/wp-content/uploads/2018/06/a11.pdf.

Emerging Practices for Successful Development of Learning Agendas in U.S. Federal Agencies

As more agencies are beginning to develop learning agendas, institutionalize processes, build stakeholder engagement infrastructure, and otherwise determine how to meaningfully accomplish the intent of the planning exercise, common themes are beginning to emerge about how to successfully develop and use a learning agenda.

Pre-conditions to Consider for Effective Learning Agenda Development Processes

The exact process an agency uses to develop and then implement a learning agenda must be specific to the context of the particular organization, its staffing capabilities, history, culture, and context. Regardless of the organization, there are certain core steps relevant for planning a learning agenda development process and then implementing it effectively to realize the benefits.

The experience of pioneering agencies—notably the Department of Housing and Urban Affairs, the Department of Labor, and the Small Business Administration—suggests that before launching a learning agenda development process, agencies need to address three pre-conditions in order to effectively develop a learning agenda.

First, senior leaders and program managers will need to identify and agree on mission objectives and goals. While clarifying goals can be supported through a learning agenda development process, if there is not a shared understanding or agreement about core mission objectives, then it will be difficult to reach agreement among leaders about relevant questions and how to prioritize those questions. Clarification of objectives may be accomplished through strategic planning and/or developing theory of change models for policies and programs.

Second, developing a learning agenda will provide useful information only if leaders, staff and stakeholders are willing to use them to promote learning in their agency. Agency staff interested in inclusively developing a learning agenda may want to first assess whether the support exists to either launch evidence-building activities based on the learning agenda or whether the learning agenda may be useful for other reasons, like demonstrating to senior leadership that knowledge gaps exist in the first place. Educating on and persuading leadership of the value of a learning agenda will help inform which stakeholders to include in the development process and also how to engage those stakeholders efficiently and productively.

Finally, agency leaders developing a learning agenda should decide on the organizational level the learning agenda at which the agenda should be produced. The agenda could cover a program, an operating division, a bureau, or an entire agency. While federal agencies are required by the Evidence Act to develop an agencywide learning agenda, how agencies implement the practice varies across several distinct models (see Exhibit 3).

Exhibit 3. Examples of Learning Agendas Used by Federal Agencies

While learning agendas are now required for many federal agencies, several agencies developed the approach before it was required. Below are a few examples that also demonstrate the range of techniques that can be used to develop an agenda:

Department of Housing and Urban Development's Research Roadmap.	Initially launched as a process in 2011, HUD designed its learning agenda on a five-year cadence. An update in 2017 acknowledged the country's changing needs for housing and communities challenged the agency's selection of priority questions to address from a list of more than 500 possibilities across eight core themes (HUD, 2017). HUD's final plan from 2017 involved multiple strategies for stakeholder feedback and input, and resulted in identification of overall priorities framed around questions like: • How are foreclosed units affecting the size of the affordable rental stock? • What are the most cost-effective strategies for lowering operating costs of housing? • Do HUD renters who live in neighborhoods with better transit have greater work participation? HUD also incorporates in its published, public learning agenda information about existing partnerships, resource availability, and the status of projects. A publicly accessible version of HUD's 2020 Research Roadmap is available at: https://www.huduser.gov/portal/sites/default/files/pdf/Research-Roadmap-2020.pdf.
Department of Labor Learning Agenda.	Within the Labor Department, each individual operating division develops a unique, nonpublic learning agenda that is aggregated into a department-wide plan by the chief evaluation officer.[14] The Labor Department's approach intends to specifically identify topics for the annual evaluation plan and the allocation of resources the agency receives annually to support specific evaluation project.
Small Business Administration Enterprise Learning Agenda.	Small Business Administration Enterprise Learning Agenda. Following publication of the Evidence Commission report, the Small Business Administration launched its process to develop the agency's first learning agenda, updated annually.[15] The agency collected feedback internally through meetings and outreach, as well as externally through contacts to trade groups, think tanks, researchers, and a publication in the Federal Register. Constructed around the agency's four strategic priorities, the plan prioritizes long-term questions that agency seeks to address. In addition to identifying relevant existing research, the plan also provides updates on the prior year's progress. It also includes specific long-term and short-term questions such as: • What impact does lending have on long-term job creation, revenue growth, and export sales? • What regulatory, policy, or process improvements could be made to help strengthen the SBA's oversight and risk management of its programs? • How satisfied are small business borrowers or other recipients of the SBA's capital access products? In addition to outlining the questions, SBA's public learning agenda identifies priorities for the subsequent two years that the agency intends to fund, relevant datasets that can be accessed for the projects, and relevant literature for reference by the evidence-building community. A publicly accessible version of the updated SBA learning agenda for FY 2018-2022 is available at: https://www.sba.gov/sites/default/files/2020-04/2020_Enterprise_Learning%20Agenda-508%282%29_0.pdf.

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[14] Nightingale, D., Fudge, K. and Schupmann W. (2018). *Evidence Toolkit: Learning Agendas.* Washington, D.C.: Urban Institute, 2018. Accessed at: https://www.urban.org/research/publication/evidence-toolkit-learning-agendas.

[15] Small Business Administration (SBA) (2020). Enterprise Learning Agenda. Washington, D.C.: SBA, 2020. Accessed at: https://www.sba.gov/sites/default/files/2020-04/2020_Enterprise_Learning%20Agenda-508%282%29_0.pdf.

The Evidence Act recognizes the need for a department-level, or enterprise, learning agenda, similar to HUD's and SBA's approach that could be a single process and document for the entire agency. The Labor Department and the Department of Health and Human Services have employed a federated model, or a bottom-up process, for generating learning agendas by operating division or unit, that are then consolidated and combined into a single, department-wide agenda. Some nonprofits and external stakeholder groups have also developed program-level learning agendas unique to a particular project or activity.

When designing the development process for learning agendas, agencies need to be intentional in orchestrating broad engagement by agency leaders, employees, and external stakeholders. Exhibit 4 highlights the design characteristics of the development process that are likely drivers of successful engagement.

Exhibit 4. Desired Characteristics of the Learning Agenda Development Process

User-Oriented	Include program managers at the appropriate level in the organization who will actually use the information
Inclusive	Include both internal and external stakeholders, including relevant regional agency and state agency personnel, grantees advocacy groups, and congressional staff
Co-designed	Ensure an open, inclusive process where all participants feel comfortable offering input
Structured	Address the same key points in each session, e.g., relevant strategic goals, key users, key decision points
Interactive	Encourage that program managers, analysts and other stakeholders work in diverse small teams on each specific task or step in the development process
Tangible	Address actual programs and upcoming policy or programmatic decision-making points, do not look too far into the future
Iterative	View the agenda as a living document that will require adjustments and revisions as priorities and circumstances for programs and/or policies change
Top-Down Support	Secure both visible and actual support from the top leadership in the agency for the development process, and include high level executives in deliberation processes
Grass Roots Input	Ensure the program managers who will actually use the information provided through evaluation and research work listed on the agenda are actively involved and offer grounded ideas about where information gaps exist.

Twelve Success Factors for Developing a Learning Agenda

In addition to ensuring an effective engagement process in the development of learning agendas, the federal agencies that pioneered the early learning agencies identified 12 success factors that they felt helped them in producing meaningful agendas. These include:

1 Consult leadership across the organization to secure buy-in to the development process.

At the outset of the development process, those leading the learning agenda formulation should consult with agency senior leaders and relevant program managers about all aspects of the process. It is especially important to secure:

- Agreement on core objectives
- Resources for the development process itself
- Agreement on staff time to support formulation
- Resources to support evidence building based on the agenda

Senior leaders should also be asked to demonstrate support for the process by signaling to the staff or organization they are also participating in the development process, and to support the implementation of the learning agenda based on a collaborative design.

2 Identify relevant stakeholders and consider outreach strategies.

Establishing a collaborative and inclusive process for developing the learning agenda requires efforts initially to identify relevant and core stakeholders within the organization, as well as externally. Stakeholders could include those inside the organization who indirectly support or benefit from an activity, such as clients or beneficiaries of services, grantees, contractors, researchers, nonprofit partners, industry, trade associations, agencies, and oversight bodies. Depending on priority stakeholder outreach needs, strategies for most effectively reaching key stakeholders will likely vary. Those shepherding the development of a learning agenda should consider a range of options for external outreach, such as the use of broad public consultation by notice or website, list serves, professional associations, webinars or meetings, advisory committees, expert panels, or other stakeholder convenings. Both internal and external stakeholders should be engaged in the development process to identify issues, prioritize topics, and build buy-in for the final product.

3 Determine major decision points for the program or organization.

Leaders and program managers in an organization are presented with inflection points when major decisions are made. While some of these moments may be unpredictable, others are recurring based on established planning and decision processes like budget formulation, policy development, and oversight or stakeholder meetings. The key points that are identified for priority activities are important elements in developing a roadmap to ensure information needs can be prioritized according to decision timelines. If the intent of the learning agenda is for evidence to be available before a decision will be made so that the evidence can inform the decision, knowing the timeline for the decision is a critical ingredient for planning the evidence-building activity.

4 Identify knowledge needs of users, including particular questions.

The questions about program activities or policy implementation could be generated as an exhaustive inventory with input from internal and external stakeholders, or a more targeted list based on strategic and operational learning needs. Efforts to identify questions with short-term or long-term time horizons will support further assessment of prioritizing questions based on an organization's key decision points.

5

Prioritize questions in consultation with senior agency leaders and stakeholders.

Questions should be prioritized using clear criteria, in consultation with senior agency leaders and key stakeholders. For example, priority questions could be selected based on those that fill the greatest gaps or achieve the largest impact on performance. Agency leaders may also seek to have a mix of priority questions that simultaneously ensure progress along multiple criteria, multiple program goals, and lengths of time to produce the evidence. Prioritization may require periodic reviews based on the production of new data, identification of existing data, changing resource needs, or even evolving circumstances once a learning agenda is developed.

6

Review existing data and evaluation studies to determine availability of existing evidence.

Developing strategies to respond to priority questions likely requires organizations to also understand the breadth of knowledge already accumulated on particular questions. Inventorying in advance the relevant descriptive statistical capabilities, research, evaluation, systematic reviews, and core data assets can help minimize duplication in the evidence-building process and efficiently align existing infrastructure with emerging needs. Based on the existing research and evidence, questions should be reviewed to ensure that priority questions for further research are still the top priorities based on established criteria.

7

Determine which data and approaches are relevant for addressing priority questions on the agenda.

Once the questions on the agenda are agreed upon, individuals familiar with the available data and with expertise in research and evaluation methods should determine how to go about responding to the questions. Some questions may merit analysis using descriptive statistics based on existing performance information or administrative records, while other questions may rely on new data collections, information collected by other organizations, or necessitate research contracts with external partners to apply rigorous evaluation methods to generate high-quality studies. The determination of approaches should be conscious of available resources.

8

Produce a written draft of the plan for review, reflection, and agreement.

While a draft learning agenda may be produced at multiple points in a process, a written learning agenda is necessary for the organization to conduct a final review and reflection with key stakeholders and senior leaders that gauges whether the learning agenda will be relevant and useful if implemented. Drafts of the agenda should be shared to elicit feedback from diverse stakeholders in a timely fashion so as to incorporate pertinent changes.

9

Share the learning agenda with key stakeholders, and then publicly.

Once agreement is reached with appropriate senior leaders, the learning agenda can be shared internally across an organization so staff members are familiar with the common, shared goals, and direction. Then the learning agenda can also be shared publicly or with external stakeholders, particularly those who participated in the development process. Engagement externally may produce insights about additional resources beyond the organization that can support implementation, including government agencies, philanthropic funders, and research institutions. Sharing a learning agenda publicly can also address transparency and accountability goals, while also providing an external oversight mechanism to encourage and foster implementation of the plan.

10

Apply resources to address priority questions.

The first step in meaningfully using a learning agenda occurs with the sharing among stakeholders internally and externally. The second step is ensuring that resources are actually applied by senior leaders and program managers to address the questions and thus begin building the needed evidence. Agency staff may also seek out partners who can supplement intramural evidence-building activities, including contract or in-kind support. In federal agencies, under the Evidence Act, evaluation officers produce publicly available annual evaluation plans that outline specific activities underway with allocated resources. Other public organizations may find this approach useful as well.

11

Periodically review the plan with senior leaders.

The evaluation staff or shepherds of the learning agenda development process should periodically review the entire plan and progress in addressing questions with senior leaders. Active dialogue about the plan can support efficient allocation, or reallocation, of resources as priorities and needs shift. For example, if an expected regulatory action has been delayed by a year, then resources for building evidence relevant to that plan might be reallocated to more pressing needs.

12

Revise the agenda periodically to incorporate new learning, evidence, and priorities.

Learning agendas are intended to be dynamic documents, not static ones. As learning from evidence is produced and knowledge gaps are filled, the learning agenda should reflect new insights and ensure priorities are indeed reflective of current needs. In this way, the learning agenda development process should be considered as continuous with a feedback loop that supports ongoing dialogue with stakeholders and organizational leaders, as well as a capability to periodically adjust priorities.

The success factors described above call for adapting the development process to fit the agency context and culture, and intentionally entail a top-down as well as a bottom-up approach to engagement within an agency. Taking the time to design an appropriate process to ensure that competent, relevant, and sufficient evidence is provided to answer the prioritized questions is a central component to the successful development and use of a learning agenda. Note that most steps in developing a learning agenda will likely occur in a linear fashion. For example, Gallagher, Finkelstein, and McNab describe an approach that begins with stakeholder engagement, then moves to question formulation and prioritization, development of activities, drafting of plans, and eventual publication.[16]

Benefits of Developing and Using an Organizational Learning Agenda

The adoption of learning agendas has garnered support across some federal agencies because of the practical benefits that the process of developing the agendas may provide. The benefits also accrue over time, making the implementation of the agenda development process, and execution of the specific research and evaluation activities listed more transparent and internalized throughout the agencies. Key benefits include:

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[16] Gallagher, D. Finkelstein, D., McNab. J. (2019). Promising Practices from Early Experiences with Developing Evidence-Building and Evaluation Plans. Washington, D.C. Mathematica Policy Research. Accessed at: https://www.mathematica.org/our-publications-and-findings/publications/promising-practices-early-experiences-developing-evidence-building-evaluation-plans-summary-report.

Builds Relationships Across Senior Leaders. The learning agenda development process typically involves collecting feedback from program managers and senior leaders engaged in implementation or decision-making activities about what they want to learn. The evaluation or analytical staff who are leading the development process need to regularly interact with agency program managers and leaders. This will strengthen day-to-day relationships that can help extend support for other types of evidence-building activities. In addition, this can help foster more collaborative engagement on the types of data and studies that are being requested. The intelligence the analytical staff secures from the program side can help them ensure the information they provide can actually be useful—and therefore used—by decision makers. In other words, collaboration during development of the learning agenda can productively promote buy-in for evidence building through the relationships forged across an agency's program and analytical staffs, like data analysts and program evaluators.

Institutionalizes the Learning Process. Organizational learning is iterative and dynamic, not static. The inclusive and collaborative routine used to develop learning agendas—with feedback incorporated periodically and revisions to the plan as priorities and conditions in an organization change collectively—allows for learning to be assimilated into organizational activities while planning for new and emerging knowledge needs.

Educates Leaders about Evaluative Thinking. Evaluative thinking, especially thinking through theories of change for policies and programs, has benefits for all aspects of design, implementation, and evaluation and is especially valuable for aligning program activities with intended outcomes. The process of developing a learning agenda can contribute to formulating a shared understanding and agreement on key goals, desired program outputs and outcomes, and obstacles to goal attainment. Because the learning agenda development process entails sense-making about specific data and evaluation needs, the process supports the integration of evaluative thinking by program leaders and managers.

Prioritizes Evidence-Building Resources. No organization has infinite resources to allocate on generating data, even in the best of circumstances. For many organizations, resources allocated to data collection, management, and data analysis may be constrained to prioritize direct service delivery or program activities. The learning agenda can help ensure that the highest priority, most information needs of decision makers receive sufficient and necessary resources. For example, agencies developing annual evaluation plans can determine from the timelines and questions included in a learning agenda how to allocate available resources across multiple years or across agency initiatives.

Shares thoughts and insights about mission achievement and progress across program management and analytical staff. Analytical staff may learn important contextual background about the realities of program implementation, and challenges that they would not otherwise have experience with, that helps them better frame their work. Involving stakeholders from across large agencies with multiple sub-units—such as the Departments of Homeland Security, Agriculture, Health and Human Services and Commerce, and/or geographically dispersed agency units—allows staff to learn through hearing other perspectives about approaches to mission achievement.

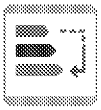
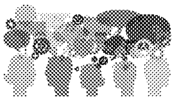
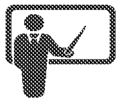
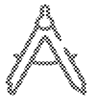
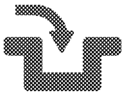
Educates program managers about existing sources of data or previous conducted analyses that they may not be aware of. When leaders and program managers bring up knowledge gaps the analytical staff may be able to point out that existing data or studies are available to address the questions, as the program side may not be aware of all existing resources.

Calibrates Information Needs in Changing Contexts. In the real world, public managers grapple with constantly shifting circumstances and leadership priorities in a political, multicultural environment. Developing and updating a learning agenda offers opportunities to review and calibrate what information is needed to align information gathering to revised organizational goals and strategic plans.

Recognizes Interorganizational Information Gaps. Employing a systematic approach to identifying information gaps may generate capabilities for sharing insights across siloed analytical units of organizations, or analysts, to allow for coordinating approaches to address particular information needs. As agencies identify strategies to promote interagency or intra-agency data sharing, for example, the learning agenda can be used to not only identify what relevant data are collected and managed by other agencies or units, but also to devise strategies to facilitate access.[17]

Importantly, the creation of a learning agenda itself is not a guarantee that an organization will automatically increase the use of data across the board or create a learning culture. But, through deliberations and the prioritization process, agenda development may help unite managers and staff across an organization to decide which data and studies are needed to help determine the extent to which goals are achieved, and help them identify future information needed to make further progress. Exhibit 5 summarizes the eight benefits of developing a learning agency in federal agencies.

Exhibit 5. Benefits of Developing a Learning Agenda in Federal Agencies

	Builds relationships across senior leaders
	Institutionalizes the learning process
	Educates leaders about evaluative thinking
	Prioritizes evidence-building resources
	Shares thoughts and insights about mission achievement and progress across program management and analytical staff
	Educates program managers about existing sources of data or previously conducted analyses that they may not be aware of
	Calibrates information needs in changing contexts
	Recognizes interorganizational information gaps

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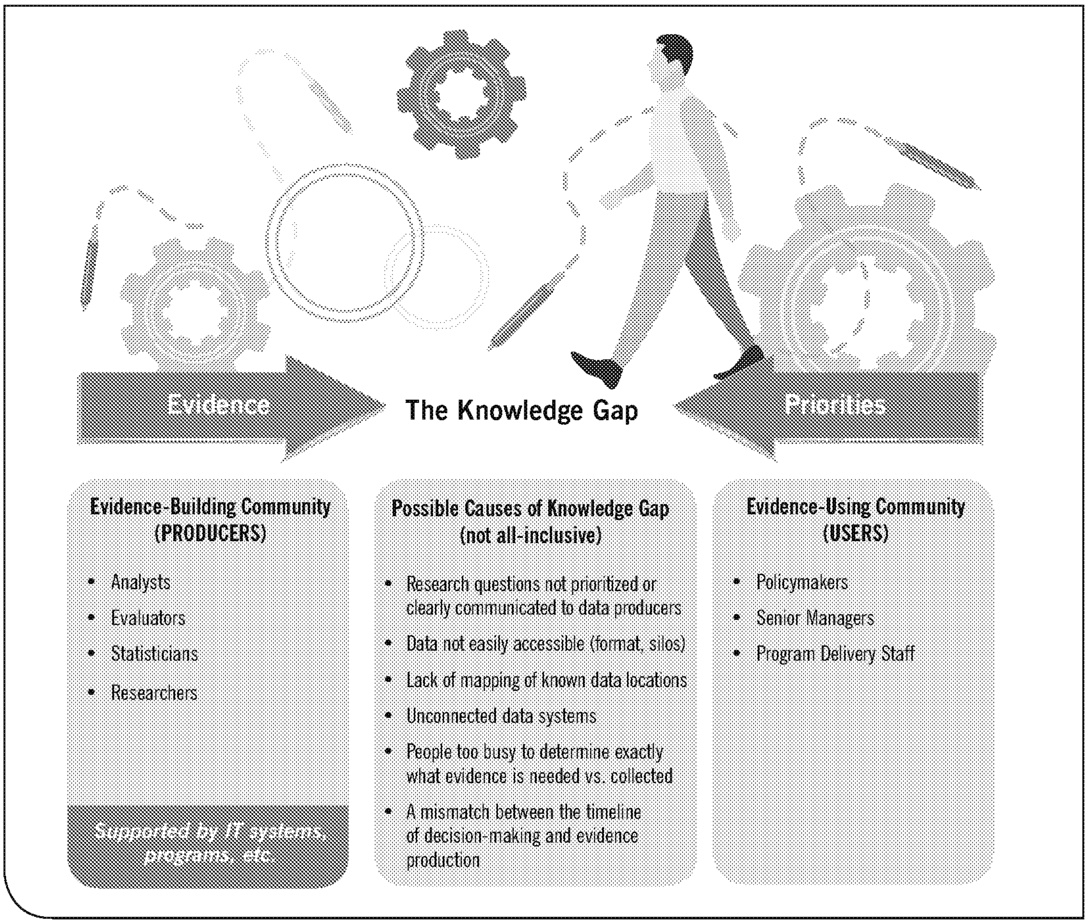
[17] See Wiseman, Jane. Silo Busting: The Challenges and Success Factors for Sharing Intergovernmental Data. Washington, D.C.: IBM Center for the Business of Government, 2020. Accessed at: http://www.businessofgovernment.org/sites/default/files/Silo%20Busting.pdf.

Federal agencies that use their learning agendas may also see better alignment between supply and demand—or for producers and users—of evidence as an outcome of the learning agenda. Because learning agenda formulation is specifically intended to calibrate the production of evidence for the eventual users, engaging the potential users and the producers in the same conversation provides a bridge between the perspectives that may traditionally operate on different timelines or even prioritize different policy research questions. (See Figure 1.)

Figure 1. Learning Agendas Can Bridge the Gap between Producers and Users



Evidence-Building Community (PRODUCERS)

- Analysts
- Evaluators
- Statisticians
- Researchers

Supported by IT systems, programs, etc.

Possible Causes of Knowledge Gap (not all-inclusive)

- Research questions not prioritized or clearly communicated to data producers
- Data not easily accessible (format, silos)
- Lack of mapping of known data locations
- Unconnected data systems
- People too busy to determine exactly what evidence is needed vs. collected
- A mismatch between the timeline of decision-making and evidence production

Evidence-Using Community (USERS)

- Policymakers
- Senior Managers
- Program Delivery Staff

Potential Challenges Developing Useful Learning Agendas

There are many challenges to developing and implementing a learning agenda in an organization, especially for the first time. Because there is no perfect recipe for how to create a learning agenda in organizations, to best address objectives and goals unique to each, challenges should be carefully planned for at the outset of the process.

As with many planning exercises, there is always a risk that mandates to produce learning agendas in the public sector can result in a compliance mindset. Compliance-oriented activities tend to reflect those that are completed as a "check-the-box" exercise to placate oversight officials or partners, but without any intent of meaningful engagement or use of the product. Ensuring that executives, senior leaders, and program managers are adequately involved and incentivized to participate promotes the development of a useful product from the learning agenda development process.

As learning agendas are developed, there is also the possibility that, based on the participants in the process, the substance reaches a level of abstraction that makes implementation difficult. For example, the loss of relevant program-level goals to produce an enterprise- or organization-wide learning agenda may mean important details are lost in the process relevant for learning about program activities. At the same time, learning agendas may be perceived as "too big to succeed." Both risks demonstrate why designing a development process with the right participants and with iterative feedback will promote usefulness. Fortunately, there are existing examples of the plans and the practice at federal agencies that balance these constraints.

Developing and implementing learning agendas also requires participation from a range of stakeholders and internal program staff. Some staff may be unfamiliar with the need or reason for engaging in evidence-building or learning activities. A limited understanding at the start of the process may also constrain how the development process unfolds. However, as noted above, the learning agenda development process can also be offered as an educational opportunity to engage more members of the program team about the role and use of evidence in all aspects of program operations. Their participation in developing the learning agenda process can also offer insights about aspects of programs that may present clear opportunities for substantial operational or administrative improvements in the short-term, providing salient success stories the program or organization can use to demonstrate the value of the process.

Engagement with stakeholders and program partners can be a challenge, even in the best of circumstances. Engaging stakeholders in a dynamic dialogue about learning may require new types of consultation and engagement that avoid unidirectional feedback. Requirements in the Evidence Act, for example, specifically direct federal agencies to engage in multidirectional consultation with Congress and other stakeholders, suggesting that policymakers have an interest in being included in the learning agenda formulation.[18] New approaches for collecting feedback from stakeholders could also include simulation or game-like workshops, which have been used in some agencies like the National Science Foundation.[19] However agencies proceed in developing a learning agenda, agency staff must also weigh the consequence of nonengagement from stakeholders who might otherwise be interested in the process, and the effect nonengagement might have on long-term program support, as well as buy-in on the learning priorities.

Some program managers and staff may struggle to obtain resources to address learning priorities. In such circumstances, leadership might identify partners, or leverage external stakeholders for support to adequately address priority questions. Indeed, the sponsoring organization need not necessarily fund or staff the production of all knowledge relevant to the questions, as some questions may actually be better addressed by other entities or partners.

Realistically, there is a core capacity challenge that the widespread production of learning agendas will face within the evidence-building community, unless the community continues to grow. As public agency leaders highlight their own learning priorities, there may not be sufficient capacity or resources in the broader community to answer all questions or provide collective support within specified timeframes. In many ways, this constraint further stresses the need for interorganizational and interagency collaboration on shared priorities and shared data, especially when topics like homelessness, poverty, economic mobility, and public health are prioritized by many different laws, programs, and organizations at all levels of government and in the nongovernmental community.

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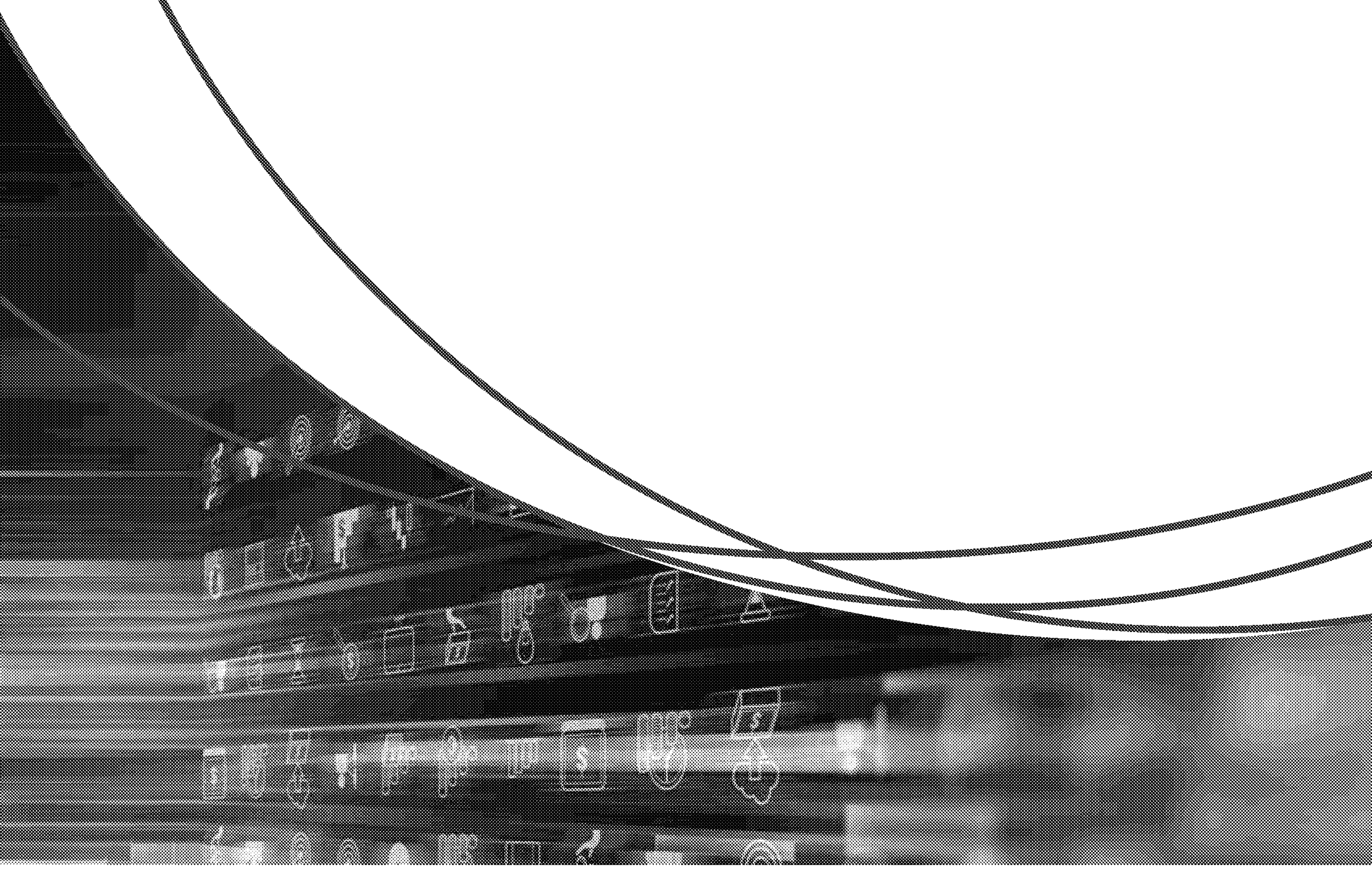
18. U.S. House (2017) -- House Report 115-411. (Committee on Oversight and Government Reform)
19. Olejniczak, K., Newcomer, K. Hart, N. (2019). Designing Learning Agendas: Moving Beyond Compliance. Paper on the 4th International Conference on Public Policy (ICPP4)., June 26-28, Montreal. Accessed at: https://www.ippapublicpolicy.org/file/paper/5d06ad4209dc9.pdf.

The Learning Agenda Design Sprint (LADS): A User-Centered Model



Bridging the Gap between Users and Producers of Evidence

Learning agendas are designed to provide an internal management tool, intended primarily for agency decision makers accountable for successful planning and delivery of programs and policies. The plan can also be used externally to promote evidence-building that may be funded by nongovernmental partners. However, the production of new knowledge and evidence is funded or supported, the emphasis on ensuring ultimate users are part of the development process—and meaningfully engaged throughout the process—will likely result in a more useful, relevant, and salient plan.

In federal agencies, there are traditionally few user-centered approaches applied that result in meaningful engagement and participatory processes. Many federal agencies rely on the use of advisory committees, which provide expert feedback on topics requested by the agency and may meet on a recurring basis. Nearly all federal agencies rely on mechanisms like the Federal Register for requesting comments in a unidirectional discussion. Some agencies, especially ones issuing regulatory actions, may engage more directly with stakeholders in the regulated community by holding workshops or public forums for soliciting feedback on draft proposals prior to finalizing an action. While these activities are attempts at engagement, they often result in agencies and individuals listening, rather than collaborating with participants on policy design.

Exhibit 6: Common Approaches to Stakeholder Engagement in Federal Agencies

Feedback Mechanism	Examples
Federal Register Request for Comments	In December 2020, the Advisory Committee on Data for Evidence Building published a request for comment seeking feedback from the public on a specific series of questions to inform the committee's work.[20] The Department of Homeland Security published a Request for Information to support public insights about the formulation of its learning agenda; the call for comments was very broad and did not include specific topics.[21]
Federal Advisory Committees	The Environmental Protection Agency runs the Scientific Advisory Board which provides feedback on a range of science, evidence, and data issues affecting the agency.
Workshops for Feedback	In formulating the evaluation standards required by the Evidence Act, OMB invited experts from government, academic, and nonprofits to participate in a workshop/roundtable to discuss the draft standards and gather feedback prior to finalizing recommendations.
Public Forums	During the creation of the Federal Data Strategy, OMB hosted multiple forums co-sponsored by nonprofit partners to gather public feedback and facilitate dialogue with the public about the draft strategies and action plans.

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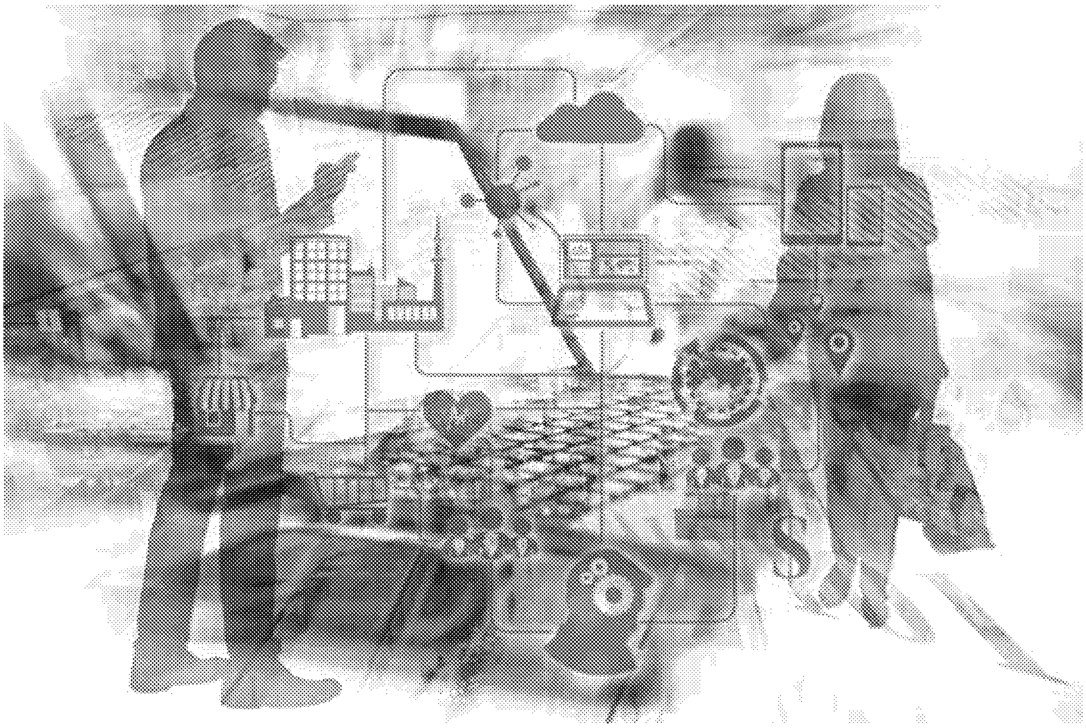
[20] *Federal Register* (2020). Request for Comments for the Advisory Committee on Data for Evidence Building (December 15). Accessed at: https://www.federalregister.gov/documents/2020/12/15/2020-27489/request-for-comments-for-the-advisory-committee-on-data-for-evidence-building.

[21] *Federal Register* (2020). Request for Information: Evidence Building Activities (November 11). Accessed at: https://www.federalregister.gov/documents/2020/11/09/2020-24836/request-for-information-evidence-building-activities.



When developing learning agendas, additional active processes should be considered as meaningful ways to engage stakeholders, such as including individuals from other parts of government in the formulation and use of the plans. The traditional, passive feedback mechanisms of the 20th century provided structured opportunities for input from stakeholders, such as via written comments on draft plan. However, to develop an effective and meaningful learning agenda that will create a sustained focus on evidence-building activities necessitates a more active strategy.

In recent years there has been a renewed interest in using design approaches in public policy[22] and public management.[23] Although the notion of policy as a design is not new, the application of highly collaborative and user-centered design to develop complex public management processes is novel.[24] This type of design method stresses focusing on understanding users of the particular solution, co-designing the solution with them, making the discussed concepts tangible. User-centered design approaches are well-aligned with the purpose and intent of the learning agendas.

The Learning Agenda Design Sprint (LADS) we present here is an evidence-based, user-centered model that focuses attention on the evidence needs that emerge at the different stages of a program or policy life cycle. The model is informed by empirical research on knowledge brokering and the original Knowledge Brokers simulation. (See Exhibit 7 for more detail.)

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[22] Bason, C. (2017). Leading Public Design. *Discovering human-centered governance.* Bristol: Policy Press.; Peters, B. G. (2018). *Policy Problems and Policy Design.* Cheltenham, UK, Northampton MA USA: Edward Elgar Publishing.

[23] Barzelay, M. (2019). *Public Management as a Design-Oriented Professional Discipline.* Cheltenham, UK: Edward Elgar Publishing; Liedtka, J., & Salzman, R. (2018). *Applying Design Thinking to Public Service Delivery.* Washington D.C.: IBM Center for The Business of Government. Accessed at: http://www.businessofgovernment.org/report/applying-design-thinking-public-service-delivery.

[24] Simon, H. (1996). *The Sciences of the Artificial* (3rd edition). Cambridge, MA: The MIT Press; Shangraw, R., & Crow, M. (2007). Public administration as a design science. *International Journal of Public Administration,* 6-8(21), 1059-1077.

Exhibit 7. The Origins of Learning Agenda Design Sprint (LADS)

The Learning Agenda Design Sprint is a model grounded in the empirical research on knowledge brokering and the original Knowledge Brokers simulation.[25] The Knowledge Brokers simulation employs case studies to explain key mechanisms and strategies for effective development and dissemination of evidence in public organizations. It has been applied by evaluation and analytical units for evidence capacity building among their staff and across organizational networks of their clients in Canada, Europe, and the U.S.

In 2018 the U.S. National Science Foundation requested transforming the original simulation into a fully open system that would allow their staff to use game elements for exploring, discussing and designing knowledge management around their specific strategy.

The prototype of the Learning Agenda Design Sprint was developed by two Polish companies— Evaluation for Government Organizations (EGO) and IGGAMES. They were joined by the U.S.-based nonprofit Data Foundation to align the game-like design model to the requirements of OMB guidance on Learning Agendas.[26]

In 2019 and 2020, the Learning Agenda Design Sprint model was pilot tested in multiple organizations in the United States and Europe, including public sector agencies and a nonprofit organization. While initially designed as an in-person facilitated workshop series, the model was substantially redesigned for asynchronous and virtual implementation. The pilot tests also showed the need for a more flexible and quicker process. Incorporating elements of google Design Sprint methodology,[27] namely a series of quick workshops with feedback loops, allowed for faster probing of user needs, generating ideas and developing shared visions.

Across the various implementation approaches, the LADS model's participatory approach was well-received and used by engaged participants to make progress in developing organizational learning agendas. Results of the processes and feedback from participants suggest the approach holds promise for supporting federal agencies in meeting statutory requirements under the Evidence Act, as well as a relevant model for international, state, local, and tribal governments that may seek to improve organizational learning and evidence building.

For the purpose of the LADS process we define "evidence users" as politically-appointed leadership, career senior executives of the agency responsible for strategic programming, and program or project managers responsible for the day-to-day implementation of agency activities. Other stakeholders who are responsible for delivery of a particular program, e.g., regional or state level managers involved in delivery, could be included. Our definition of evidence users is contextual, related to the ecosystem of stakeholders and decision makers relevant to the specific program, mission or agency objective that will be the subject of the LADS model.

"Evidence producers" are staff in monitoring and evaluation units, performance offices, statistical agencies, policy analysts, data scientists, and other staff responsible for conducting or contracting out diverse evidence-generating activities, such as research, evaluation, and monitoring. Involving both evidence users and producers together in LADS is intended to reduce the gap between evidence producers and programmatic decision makers. The evidence producers and potential users typically are driven by different imperatives and time frames and may use different languages and practices.[28]

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25. Olejniczak, K. (2017). The Game of Knowledge Brokering: A New Method for Increasing Evaluation Use. *American Journal of Evaluation,* 38(4), 554-576. https://journals.sagepub.com/doi/10.1177/1098214017716326.

26. OMB. (2019). M-19-23. Memorandum for Heads of Executive Departments and Agencies. Implementation of the Foundations for Evidence-Based Policymaking Act of 2018: Learning Agendas, Personnel, and Planning Guidance. Washington D.C.: Executive Office of the President. Office of Management and Budget.

27. Knapp, J., Zeratsky, J., & Kowitz, B. (2016). *Sprint. How to Solve Big Problems and Test New Ideas in Just Five Days.* New York, NY: Simon & Schuster; See also: https://designsprintkit.withgoogle.com/.

28. Caplan, N. (1979). The Two-Communities Theory and Knowledge Utilization. *American Behavioral Scientist,* 22(3), 459-470; Palenberg, M., & Paulson, A. (Eds.). (2020). *The Realpolitik of Evaluation: Why Demand and Supply Rarely Intersect.* New York, NY:

LADS brings together evidence producers and users in dynamic yet structured dialogues and workshops. The simulation allows them to jointly articulate, test, and confront their assumptions, perceptions, and hypotheses on how a program works, what evidence is needed, and when it is needed to inform decisions. Bringing together evidence producers and users during the design process to focus on a common set of goals may trigger the development of two important sets of insights. First, producers gain understanding of information needs, timelines, and contextual factors that affect the work of evidence users. Thus, producers may be able to align evidence-building activities with the timing of actual decision-making processes. And second, evidence users are given time to reflect on the bigger picture on how decisions are made. The evidence users can observe the link between decision points and evidence that could inform them, and the need for diverse types of evidence (operational, strategic, descriptive) at different points during policy or program implementation. Furthermore, the evidence users gain experience in articulating more precisely what sorts of evidence they need, or at least the particular questions they might have at different points in time. The objective of bringing evidence producers and users in a shared dialogue about learning needs and priorities serves as the basis of the Learning Agenda Design Sprint.

Application of the LADS model is contingent on answering several key questions, generally aligned with the pre-conditions for learning agendas discussed previously. The model also entails specific design aids and design procedures, each discussed in turn below.

Questions to Ask Before Conducting a Learning Agenda Design Sprint

The Learning Agenda Design Sprint is a tool for evaluation officers, or other senior managers who are in a position to lead a learning agenda development process. The model is based on existing research about organizational learning within public agencies that indicates that evaluation units and evaluation officers should serve as initiators and facilitators of the process of developing learning agendas.[29] The high level of engagement of stakeholders is also consistent with the requirements of the Evidence Act. Evaluation officers should be positioned to secure participation of potential evidence users in the Learning Agenda Design Sprint process, whether it is conducted in-person or virtually.

As key owners of the process, evaluation officers should start by answering the three following questions before conducting a sprint:

Question 1: What is the scope of the design exercise?

The facilitator who is in charge of running the LADS starts with addressing the critical decision of which agency stream of activities, program, or strategic goal will be addressed. The focus of the exercise should be determined by the agency mission, the structure of priorities, strategic plans, and strategic goals. The focus might be an agency's strategic goal or a set of programs, or even a cross-agency shared goal, with clear objectives and general agreement among stakeholders about what those objectives are. The LADS is flexible in that it can be employed to develop one Learning Agenda for the whole agency, or to produce sets of learning agendas for each of the agency's strategic priorities, programs, or divisions (which can later be aggregated into an agencywide learning agenda).

In addition, in consultation with agency leadership, the facilitator has to decide on the time perspective they want to cover in the LADS process. Should the timeframe be one year, four

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Routledge.

[29] Olejniczak, K., Raimondo, E., & Kupiec, T. (2016). Evaluation units as knowledge brokers: Testing and calibrating an innovative framework. *Evaluation,* 22(2), 168-189.

years, or six months? These two decisions are fundamental since they determine the focus of the learning agenda and form boundary conditions for the whole creative design process. A core prerequisite for the design exercise is the identification of what will be discussed.

Question 2: How advanced are we in the learning agenda development process?

The facilitators should consider how mature the process of learning agenda development is in their agency. The LADS model can be used at different phases of an agency's learning agenda development process, for example, when a first learning agenda is initially considered or when an existing learning agenda is being refreshed.

For staff who are first-time participants in the LADS process, the initial results might be (1) a mapping of the ecosystem of potential evidence users, (2) developing a shared understanding among the program staff and leadership about the program's "journey," and (3) when and how evidence could be used to inform agency decision makers.

For participants with more experience in developing a learning agenda, LADS could help evidence producers better prioritize multiple evidence needs, link them with specific decision timelines, and achieve a balance between operational and strategic issues. Dialogue between evidence producers and users should also help in streamlining the flow of evidence, mainly by forging a shared understanding between the analytical staff and the program delivery managers.

For agencies with experience in developing a learning agenda, LADS could also serve as an opportunity for critical self-reflection. For example, the exercise could allow both programmatic leadership and evidence producers to question long-standing assumptions they have made (e.g., about decisions on inclusion of certain stakeholders as evidence users), and to reconsider the focus of learning they had selected (e.g., the balance of operational and strategic perspective, and shorter versus longer-term learning).

Question 3: Who should be involved in the design exercise?

In recruiting or requesting participation from senior leaders and other stakeholders, the facilitator must take into account the limited time availability of the more senior leadership and program administrators within and outside the agency. And the facilitator needs to clarify the different categories of evidence producers and users who are needed to make the dialogue productive. Participants in the simulation are needed from four groups:

- **Category 1: Evaluation and other Evidence-Generating Staff**. The first group consists of evaluation office staff, and representatives of other offices producing data and information in the agency. These staff should be involved in all workshop activities, and provide the backbone for the entire operation and activity. Their time commitment is the greatest of all of the potential participants.
- **Category 2: Program Delivery Staff.** This group is comprised of agency personnel in the units primarily responsible for the delivery of the programs in question (preferably the heads of those units). These staff would be involved in most of the workshop activities. Their time commitment is also substantial.
- **Category 3: Decision Makers.** A third group consists of strategic decision makers and senior staff of the agency responsible for the design and implementation of programs. They would be consulted periodically at different points during the in-person or virtual workshops, and asked to comment on draft deliverables. Their input is a valuable aspect of the process to ensure the priorities and timing of evidence needs are clarified to evidence producers.

- **Category 4: External Stakeholders**. A last group of individuals consists of external stakeholders of the agency or organization. Individuals in this category could be identified either before, or early in, the LADS process so they can participate throughout the remainder of the process and the workshops. Individuals in this group might include representatives from the general public, other agencies, other levels of government, nonprofits, or the research and evaluation community.

In all cases, the ability to coordinate and consult with stakeholders and participants across these four categories is essential to effective use of the LADS process.

The Seven Steps in Conducting a Learning Agenda Design Sprint

The Learning Agenda Design Sprint is a seven-step process. It consists of a series of workshops and person-to-person interactions (virtual or in-person). During the first workshop session, participants are briefed on the entire design process and begin the drafting process for the learning agenda. But the session will not result in a complete, draft learning agenda—the process is intended to be participatory and iterative. After the first workshop, subsequent sessions focus on various steps in the design process, reflecting on the information produced previously, and gaining perspectives from senior decision makers and evidence users. Ideally a LADS exercise can be conducted in-person over the course of a week, in four sessions, with some feedback given to participants in-between sessions. It is also adaptable to an online engagement that can be conducted over several weeks. Exhibit 8 compares the pros and cons of each approach.

Exhibit 8. A Comparison of In-Person and Online Learning Agenda Design Sprint Workshops

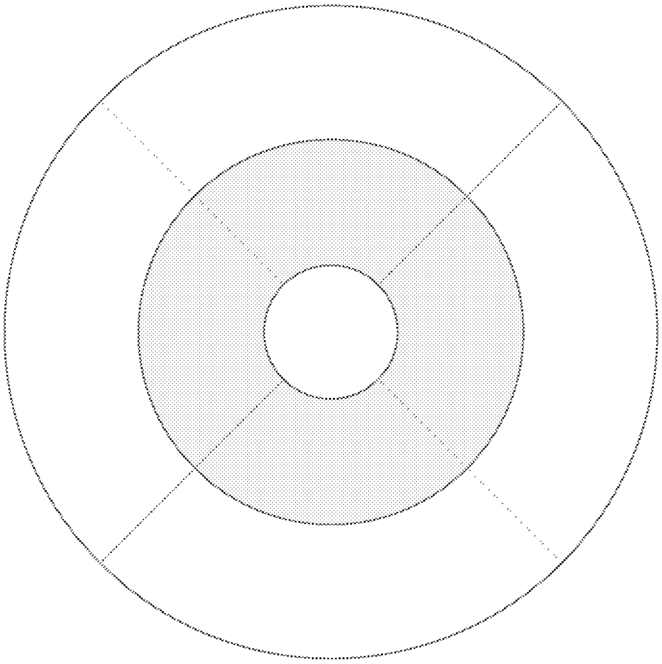
In-Person Workshops	Online Workshops
• Allows for easy birds-eye perspective for all participants but can become overcrowded with in the case of more complex Learning Agendas • Requires presence for in-person scheduled meeting but that allows clearer interpersonal communications, both verbal and nonverbal • The physical board and cards are clear, tangible objects that make the discussion about abstract concepts easier • Requires transition of the results of the creative process into a digital version	• Allows development of highly detailed canvas. Zooming in and out is possible although the screen size could limit the clarity of the bigger picture • Allows for asynchronous work and work in smaller creative sub-groups as well as chat rooms exchange. Still on-line creative work can be awkward • Can collect data in a digital format (PDF, JPG) although this requires transcribing to input into word processing software

Organizational arrangements and design aids

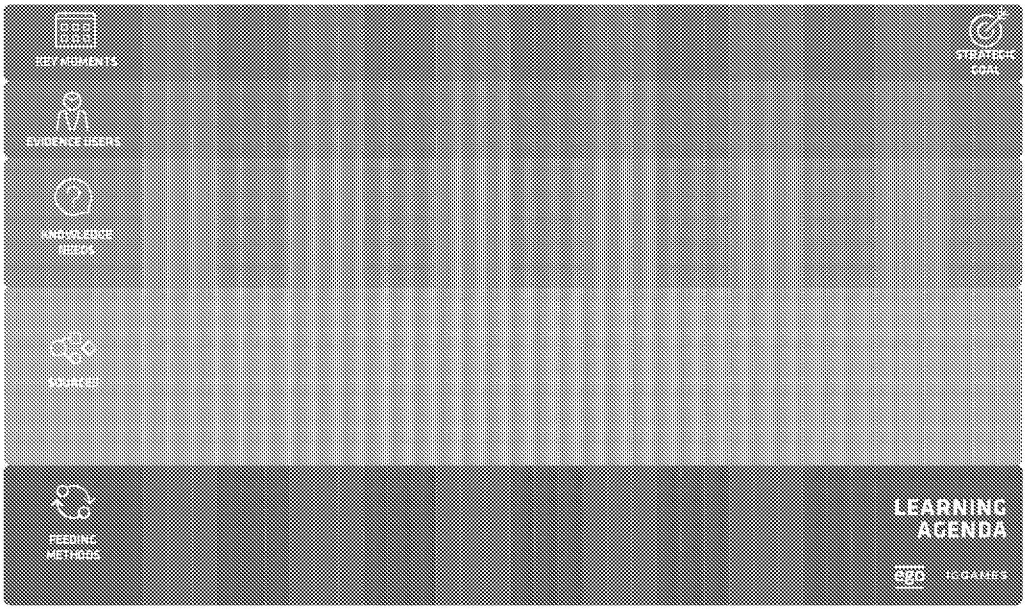
The design process takes place on two canvases: (a) a stakeholder map and (b) a Learning Agenda board (see Figure 2). For the physical workshops the stakeholder map takes the form of big, game-like boards (35 x 35 inches and 60 x 35 inches) to allow easy group interactions with both birds-eye and eagles-eye perspectives. During the process, participants use cards and markers to write down their ideas on different aspects of learning agenda, and they are given a variety of wooden tokens to assess and mark the specific characteristics of particular cards. For the online workshops, canvases are available for participants on the Miro platform with options for zooming in and out. Participants can use virtual cards, post-it notes, tokens, or voting to submit ideas and interact on the platform.

Figure 2: Design Aids When Conducting a Learning Agenda Design Sprint

The template for the stakeholders' map



The template for the Learning Agenda design board


KEY MOMENTS
STRATEGIC GOAL
EVIDENCE USERS
KNOWLEDGE NEEDS
SOURCES
FEEDING METHODS
LEARNING AGENDA
ego
IGGAMES

Source: Conceptual design: EGO & IGGAMES; graphic design: Adam Banaszek.

During the workshop participants are placed into groups of three to five individuals. If the group of the workshop session participants is larger than five, then individuals should be divided into multiple teams working on separate tasks. The work of the multiple teams could cover multiple goals or projects, or alternately the teams could work on identical topics with separate canvases, and then compare/contrast their work at each design stage.

STEP 1: Develop a Stakeholder Map

GOAL	OUTPUT	WHY
Understand which stakeholders are relevant to the success of your strategy/ program	Stakeholders' map for the specific strategy/program in question	The map of stakeholders will help us later in deciding who should be involved and when, in certain learning activities.

The first step of the process is to identify internal and external stakeholders. Some of this information will likely have been identified prior to the first workshop, and could be used to identify potential participants, these initial participants may expand the list.

Definition of Stakeholders for Learning Agendas

Stakeholders are individuals or entities that have an interest in the execution of a goal (e.g., benefit or loss, or are impacted by), have an important role in implementation, and or possess key resource or decision-making power crucial to achievement of mission.

In this step, participants identify which stakeholders could affect the success of the selected program or strategic goal. Working from a chart with concentric circles, the program or strategic goal is at the center of the circles and different types of stakeholders are identified in rings around it, including internal, external, oversight, partners, allies, and opponents. Each level of the concentric circles connotes the relative importance of the stakeholder for achieving program goals, their interest in execution, or the extent of their role in implementation. Stakeholders involved in implementation might include, for example, representatives of state or local governments, nonprofits, and/or private sector contractors involved in the delivery of the program or strategy. During the session, participants directly identify and note the relevant stakeholders, and discuss them with other participants in the process.

The reason the LADS begins with a stakeholder map is simple: many programs may have a general sense of stakeholders but not a comprehensive, shared understanding of the community that affects achievement of goals and objectives. Through brainstorming about potential stakeholders early, additional individuals can be invited to participate in the subsequent steps in the process. The stakeholder mapping process is also useful for identifying indirect evidence producers and users who can support or otherwise affect implementation of identified activities.

Step 2: Identify Key Decision Points

GOAL	OUTPUT	WHY
Identify points when evidence would be especially helpful to assist in mission achievement (at the strategic or operational level).	The top row on the Learning Agenda board is filled in with a sequence of strategic decision points.	Listing important deadlines will help align the timing of the demand and supply for evidence. It will also organize our learning activities as an aid for important decision points.

During the second step, participants identify points in time—“decision points”—when evidence would be especially helpful to inform program or strategy implementation. Identifying the key decision points enables the development of a timeline so that the production, identification, or brokering of evidence can occur before decisions are finalized. For this step, the session participants start with putting program goals at the end of the timeline. Then participants use their existing knowledge of program operations to consider major decisions around budgets, reauthorizations, regulations, policy guidance, grant awards, operational activities, and other major activities in a program. All of the identified decision points are also placed on a relative timeline during the course of the activity so that milestones, critical decisions, crucial meetings, reviews, reporting requirements, and even major stages of program implementation are clearly identified.

Definition of Key Decision Points

“Decision points” could mean milestones, key decisions, crucial meetings, reviews, reporting requirements, even stages of the implementation, etc. If possible, participants should avoid putting periods of time, e.g., periods of implementation. They should rather put concrete decision points that have a concrete date in time.

Step 3: Catalog Knowledge Needs of Evidence Users

GOAL	OUTPUT	WHY
Identify the knowledge needs of decision makers who need to make better decisions, at key points in the program strategy’s timeline.	The two rows on the Learning Agenda board (emerald and orange) are filled in with ideas on evidence users and their questions. They are aligned with sequence of strategic decision points.	This will help establish the actual demand for knowledge and focus knowledge production efforts on the actors who are genuinely concerned with specific decision making.

Once the program timeline is established, the workshop participants identify who needs what evidence to make decisions at the specific points in time. For each decision point on the timeline, participants decide which stakeholders are the primary decision makers; these stakeholders become the evidence users. It is possible that one decision situation could involve several evidence users. During the brainstorming, participants also refer to their initial stakeholder map (see Step 1). Based on this, they can discuss which actors from the stakeholders' map may be involved in the decision making, when they should be involved, and why some stakeholders from the ecosystem of the program do not emerge as evidence users. Discussing the roles of the various stakeholders can lead to meaningful conversations about the program's ecosystem of decision makers, the current level of stakeholders' involvement in key deliberations, and underlying assumptions and reasons for any discrepancy between declared involvement and actual presence of stakeholders in key decision-making deliberations.

Definitions of Evidence Users, Their Knowledge Needs, and Questions They Might Raise

Key ***evidence users*** are those who are primarily responsible for making a particular decision or who have such high interest in the issue that they are willing to actively engage in the learning agenda development process.

Knowledge needs come in the form of questions that are raised by decision makers. Questions can be of a strategic or operational nature, they can ask for explanations of processes or effects, or ask for descriptions or diagnoses of conditions relevant to achievement of desired program outcomes.

The ***questions*** that are framed can be grouped into the following categories:[30]

1. Context: learning about emerging issues, current circumstances, the nature of the problem addressed by government action, and targeted beneficiaries
2. Ideas: learning about what solutions are possible, how others have addressed similar policy issues, and what was done in the past
3. Process: learning how implementation is progressing, or not, and why bottlenecks and delays happen
4. Results: learning what works and why—the results of making a change and the mechanisms that produce the desired effects

At this stage of the creative process, participants should focus on the merit of the questions as expressed by the particular user. Wordsmithing to refine the actual wording of the questions can take place later.

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[30] Nutley, S., Walter, I., & Davies, H. T. O. (2003). From Knowing to Doing. A Framework for Understanding the Evidence-Into-Practice Agenda. *Evaluation,* 9(2), 125-148; Kettl, D. F. (2017). *Little Bites of Big Data: How Policy Makers use Data.* Thousand Oaks: Sage and CQ Press.

During the session participants consider the knowledge needs for each identified evidence user and frame questions that might be addressed to inform decision making.

The main objective in this step is to identify the major questions that will arise at key decision points and to be as specific as possible. After initial brainstorming on questions, participants will be asked to step back and reevaluate their usually extensive list of ideas. The simple, pragmatic heuristic is to distinguish between "need to know" and "nice to know" questions. The former is information that needs to be provided to decision makers at a particular decision point in order to facilitate learning about the program. The latter are insights that are valuable yet not necessary prerequisites for informing decision making.

Step 4: Feedback from Senior Management

GOAL	OUTPUT	WHY
Build a shared understanding of the program/strategy within an organization.	Comments from senior management that can inform the perceptions and assumptions of the evidence-generating and program delivery staffs.	To create a common understanding of the program timeline and information needs among different program staff and decision makers to improve the future match between evidence demand and supply.

Following the participants' identification of stakeholders, decision timelines and key questions, senior leaders in the organization should be asked to review all, and asked to offer additional suggestions, and determine the alignment of questions that were framed with their own expectations. A divergence in perspectives does not necessarily suggest a failure in the process, or shortcomings in the participants' ability to align their views with leaders' expectations, it is a necessary component of the dialogue and iteration since participants come to the process with varying perspectives based on their own roles and experiences. This step may be repeated multiple times to seek convergence on priority questions and informational needs.

Step 5: Plan Learning Activities

GOAL	OUTPUT	WHY
Decide where to get credible evidence, and how to disseminate it to users to help them make more informed decisions.	Two bottom rows on the Learning Agenda board are filled with ideas from the evidence producers. They are linked to the questions framed in Step 3.	The answers to the questions raised by evidence users need to be addressed with credible and sound evidence. Furthermore, the answers, in order to be useful, have to be conveyed to decision makers in ways that are aligned with their communication preferences.

This is the most detailed portion of the workshop since it focuses on planning specific evidence production and dissemination activities. The group of participants is limited to evidence-building staff (research staff, teams from analytical units, evaluation and monitoring units, performance officers, data scientists). Having the list of questions and the timeline for when decision makers need answers, the group will focus on identifying credible approaches to address the questions. The goal of this step is to consider how to generate needed evidence, and plan on the channels through which evidence can be produced and then provided to decision makers and other potential users. For each question, participants brainstorm about what could be reliable sources of data or information to answer it. One question may be addressed by multiple sources. Sources can include experts, surveys, data sets (monitoring data, general statistics), research studies and evaluations, performance audits, consultations, and discussion panels with experts or stakeholders. Of note, and consistent with the Evidence Act requirements, an important aspect of the exercise for federal agencies is to identify what data they may need to collect, data that another agency already collects that may require a sharing or use agreement for access, or alternative sources of data beyond government that could provide useful evidence.

Definition of Learning Activities

Learning activities include both evidence generation activities and dissemination actions. Sources of needed evidence may include data sets, existing monitoring systems, and research studies, as well as consultations, and discussion panels with experts or other stakeholders. When discussing how to provide the needed evidence to the users, participants should think in terms of both forms and channels of communication with users, including meetings, structured team discussions, and the format and length of presentations.

The participants also reflect on the synchronization of timing between preparation of evidence and delivery to users. The timeline of research studies, especially those addressing more complex questions, often substantially deviates from the points in time when results are needed. For example, questions about potential program outcomes may be asked too late in the decision making process to launch a reliable study. Thus, participants need to anticipate the time needed to deliver evidence. Furthermore, participants identify studies that are assigned to address questions about program effects. They check to see if somewhere on the program implementation timeline those studies have been preceded by some form of baseline measurement, and if the studies are allocated sufficient time to actually measure impact.

Finally, during this step, participants brainstorm about what format and through what means they plan to provide the needed evidence to the users. They consider the profiles of decision makers and their preferred means of communicating. The evidence to be conveyed could be communicated in multiple ways, such as via briefings, meetings, structured team discussions, and other forms of presentations.

Step 6: Feedback from Evidence Users

GOAL	OUTPUT	WHY
Build the shared understanding of the program/strategy among program stakeholders.	Comments from evidence users correcting the perceptions and assumptions on learning activities—sources and dissemination methods.	To align perceptions of evidence users and producers, and ultimately to better match evidence supply with demand.

In this step, evidence users (senior management, program managers, and selected stakeholders) review the proposed actions developed in Step 5 by the evidence generating staff. Feedback is focused on two issues: (1) perceptions of the credibility of the evidence and (2) user-friendliness.

When considering evidence credibility participants look at the questions and sources assigned to answer each question. They discuss if these sets of sources are acceptable to decision makers in providing credible answers and sound arguments. If the sources are in doubt, participants can delete them, or revise source descriptions. These discussions can lead to productive conversations. On the one hand, evidence users can ask evidence producers to simplify their research activities, and perhaps to provide less extensive evidence, and not provide more time and resource consuming evidence. On the other hand, evidence producers can educate users about the quality of the different types of evidence, and their need to provide different sorts of evidence to answer different types of questions (e.g., the need to establish a counterfactual in order to measure program impact).

When it comes to user-friendliness, evidence producers may not appreciate that acquisition is not the primary responsibility of potential evidence users. Thus, when planning on reporting evidence, providers should avoid overloading users with complex, diverse information, and time-consuming meetings. Feedback from evidence users about their expectations for reporting allows evidence-generating staff to better align reporting methods with the users' preferences.

Step 7: Review the Final Product and Process

GOAL	OUTPUT	WHY
Improve the utility of the Learning Agenda and the LADS process	Improved version of a learning agenda with decision points, questions, and strategies to address the questions.	Make sure that during the creative process the strategic objective has not been overburdened with details, and that planned activities will facilitate organizational learning.

The final step in the process is used to review the product and improve the overall design of the learning agenda. The participants reflect on materials developed during the process. They are guided by key reflection questions posed by the facilitator that address three issues:

- Program/strategy path to success
- Learning loops
- Anticipation of challenges

The first reflection point is to clarify the path to **program/strategy success**. When participants plan elaborate processes, they may drown in fragmented details and miss the bigger picture. The risk is that they will overlook: (a) the pivotal decision points and (b) transitions points that mark important stages in program development and implementation.

Participants are asked to re-evaluate their key decision points and mark pivotal moments in the program timeline (so called: make-or-break points). This activity helps participants remove minor reporting requirements and routine decisions from the potentially overcrowded timeline.

The second reflection point is to focus on **improving learning loops.** Research on organizational learning indicates that bureaucratic organizations tend to focus on single loop learning (processual question about "doing things right"—according to procedures and on time, addressing symptoms of the problems), and downplay double loop learning (strategic questions such as if they are doing the right things, addressing root causes of the problems).[31] Moreover, performance monitoring systems put in place can often lead to suboptimal practices, distorting organizational behaviors and outcomes (e.g., tunnel vision, ossification, myopia).[32]

To minimize this tendency, participants are asked to select questions that are about implementation processes versus questions about program effects and their explanations. Through this sorting process participants can assess the proportion of questions that address operational versus strategic knowledge needs.

Furthermore, participants are asked to check if questions about program effects will correspond to ideas of how to generate adequate answers. In general, this activity should help to minimize sub-optimization and organizational myopia.

Striking A Balance Between Taking Short- and Longer-Term Perspectives

Operational questions ask about progress, procedures, and bottlenecks. Strategic questions ask about purpose, assumptions, approaches, change mechanisms, and effects. A simple checklist used during LADS workshops includes the following questions:

1. What are the relative proportions of Operational and Strategic Questions?
2. When and how do we learn about the overall achievement of our mission? What is our baseline?
3. Is there time for reflection set at major milestones? What do we learn at those reflection points?

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[31] Argyris, C., & Schon, D. A. (1995). *Organizational Learning II: Theory, Method, and Practice.* Reading, Massachusetts: FT Press.
[32] Smith, P. (1993). Outcome-related Performance Indicators and Organizational Control in the Public Sector. *British Journal of Management,* 4(3), 135-151.

The third reflection point to be discussed is to **identify anticipated challenges**. Participants discuss challenges that may emerge to affect the successful use of the learning agenda. This reflection is followed by a separate discussion on ways to address obstacles that participants identify. Following the reflection period, the learning agenda draft is compiled, revised, and finalized based on stakeholder and participant feedback. Figure 3 summarizes the seven steps:

Figure 3. Steps in Learning Agenda Design Sprint

Step of the LADS process	Reference icons on design aids (see Figure 2)	Forums and participants
STEP 1: Develop a Stakeholder Map What actors could have a potential influence on the achievement of the goal listed in the Learning Agenda?	👤 🏛	**Workshop 1** Evaluation and Evidence-Building Staff, Program Delivery Staff
STEP 2: Identify Key Decision Points When are the decision points when evidence would be especially needed for effective program/strategy delivery?	📅 🎯	
STEP 3: Catalog Knowledge Needs of Evidence Users What evidence is needed by whom, and by when, to make better decisions for the program/strategy?	👤 ?	**Workshop 2** Evaluation and Evidence-Building Staff, Program Delivery Staff
STEP 4: Feedback from Senior Management Are our ideas so far aligned with the vision of senior management?	🔄	Meeting or asynchronus online comments Evaluation officer, Decision-Makers
STEP 5: Plan Learning Activities What sources and methods will we use to provide decision makers with a credible evidence base?	🔀 🔄	**Workshop 3** Participants: Evaluation and Evidence-Building Staff
STEP 6: Feedback from Evidence Users Are our ideas on learning activities aligned with expectations and preferences of evidence users?	🔄	Meetings or asynchronus on-line comments Evaluation Officer, Decision Makers, Program Delivery Staff, Stakeholders
STEP 7: Review the Final Product and Process Looking at our overall learning cycle, is the resulting agenda complete, and aligned with users' needs?	✓	**Workshop 4** Evaluation and Evidence-Building Staff

Exhibit 9. Lessons from Recent Applications of the Learning Agenda Design Sprint

1	A Learning Agenda Design Sprint carries clear benefits when implemented as intended: Staff and stakeholders can develop a shared understanding of the program design and implementation timeline, and evidence needs connected with this timeline, and they co-develop questions and then optimal approaches to address those questions.
2	The model can be applied in-person or virtually, though the dynamics of implementation are substantially different in a virtual setting, and the opportunity for meaningful group reflection is limited by the quality of the technical arrangements (screen sizes, quality of internet connections). Yet, the loss of efficiency may be easier to tailor to large groups' schedules by allocating the activities asynchronously using virtual platforms like Miro.
3	The model is flexible and allows different levels of investment of time from senior leaders, evaluation officers, and other program staff.
4	The Learning Agenda Design Sprint model can help develop meaningful and useful learning agendas. Because of the short but highly interactive nature of the model, it provides a method for kick-starting a longer, agencywide development process, and/or enable concurrent sessions across a highly decentralized or geographically dispersed agency.

RECOMMENDATIONS

As agencies proceed with developing learning agendas and evidence-building plans in coming years in the United States, they will continue to also learn how to improve the implementation process. Based on the experience of early adopting agencies and our own experience with implementing a user-centric design process, there are a series of clear priorities and recommendations for fulfilling the intent of the learning agenda in coming years.

Recommendation 1

Congress should provide federal agencies flexibility to develop their learning agendas after the quadrennial strategic planning process has been completed, not concurrently. The Evidence Act's requirements for issuing an agency's learning agenda in parallel with the issuance of its strategic plan present major obstacles for alignment of the information needs to the real questions faced by the agency. The concurrent deadline presents obstacles to incorporating the right needs and timelines for annual evaluation plans or agency statistical activities. A recognition by Congress that the inclusion "in the strategic plan" may include technically publishing in the months after finalizing the strategic plan would support agencies in aligning missions, goals, priorities, and needs in a timely and accurate way.

Recommendation 2

Congress, the president, and senior agency leaders should prioritize allocating resources for learning needs and evidence-building activities. Once agencies have formulated meaningful learning agendas to address agency evidence needs, resources must be allocated to actually build the requisite evidence. Resources may be allocated practically through direct appropriations, set-aside funding, reallocations and reprogrammings, or other means.

Recommendation 3

The Office of Management and Budget should update guidance to direct agencies to publish learning agendas publicly. The Evidence Commission prioritized the principle of transparency, a concept that is reflected in OMB's Evaluation Standards and the underlying motivation for the learning agenda construct itself.[33] Agencies should publish and share their learning agendas widely with the public and relevant stakeholders, including oversight officials and the research community. Wide distribution of agency learning agendas may foster external researchers in addressing information needs, the prioritization of new resources, and other benefits. When OMB issues its new guidance on learning agendas, consistent with direction from President Joe Biden to OMB in January 2021, the OMB director should specify that learning agendas be shared and published as open resources.[34]

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33. OMB (2020). M-20-12. Memorandum for Heads of Executive Departments and Agencies. "Phase 4 Implementation of the Foundation for Evidence-Based Policymaking Act of 2018: Program Evaluation Standards and Practices." Washington D.C.: Executive Office of the President. Office of Management and Budget.

34. See Sec. 5(b) in Biden, Joseph (2021). Memorandum for Heads of Executive Departments and Agencies. "Memorandum on Restoring Trust in Government Through Scientific Integrity and Evidence-Based Policymaking."

Recommendation 4

Agency evaluation officers should strategically involve stakeholders when developing learning agendas using proactive engagement approaches tailored to the agency ecosystem. Every agency will vary in the breadth of their existing stakeholder engagement processes, but agencies should consider the full range of possibilities for pursuing engagement and avoid the tendency to rely exclusively on written feedback provided to the agency in response to a Federal Register notice. Participatory processes such as implementing the Learning Agenda Design Sprint process, holding forums, workshops, and public meetings, and involving advisory committees can be productive in broadening the feedback and dialogue on the learning and evidence needs of decision makers.

Recommendation 5

Federal agency evaluation officers should consider applying the Learning Agenda Design Sprint (LADS) model to more effectively engage stakeholders when developing learning agendas. The model described in the previous section has been tested in different organizational contexts. It carries clear benefits when implemented as intended: staff and stakeholders can develop a shared understanding of the program decision journey and key information needs, as well as align the demand and supply of evidence for decision making at both a strategic and operational level. LADS can be implemented in person or remotely, in a digital environment. They can be used to develop creative, user-centered input at different stages of a federal agency's learning agenda life cycle.

CONCLUSION

Learning agendas are tools that offer real promise to public organizations for identifying learning needs. Learning agendas encourage devising a shared strategy for addressing those needs, with support from senior leaders, program managers, and external stakeholders. Learning agendas can also generate insights about where evidence-building capacity may be most critical to enhance a public organization's success in applying evaluative thinking and practice.

While some federal agencies have already adopted processes to meaningfully apply learning agendas to guide their research activities and use the resulting information to improve outcomes, many federal agencies have a long road ahead to realize the promise of a learning agenda. Lasting improvements for evidence-building capacity are nonetheless possible if agencies are able to overcome the tendency to focus on compliance with the statutory requirements and instead promote and encourage real learning and engagement.

The bipartisan direction from Congress in 2018 to establish a learning agenda and the guidance from the president in 2021 acknowledging the role of this tool in supporting policymaking suggests that many policymakers in the federal government are eager and enthusiastic to use evidence to meet their information needs. Appointed officials, senior leaders, and career civil servants now have the opportunity to marshal forward to design and implement plans that support the rapid building of relevant, credible and useful evidence. While learning agendas cannot guarantee more evidence-informed policy or drastic performance improvements, the development and use of learning agendas holds substantial promise for encouraging the use of science and evidence in government decision making.

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APPENDICES

Evidence Act Requirements for Learning Agendas

Congress passed and the president enacted the Foundations for Evidence-Based Policymaking Act in early 2019. Section 312 of that law included details of an evidence-building plan at the agency-level, as a requirement for the 24 largest agencies in the U.S. federal government. The section outlines the basic expectations of what must be included in the agency-level learning agendas:

> *Sec. 312. Agency evidence-building plan*
>
> *(a) The head of each agency shall include in the strategic plan required under section 306 a systematic plan for identifying and addressing policy questions relevant to the programs, policies, and regulations of the agency. Such plan shall contain the following:*
>
> 1. *A list of policy-relevant questions for which the agency intends to develop evidence to support policymaking.*
> 2. *A list of data the agency intends to collect, use, or acquire to facilitate the use of evidence in policymaking.*
> 3. *A list of methods and analytical approaches that may be used to develop evidence to support policymaking.*
> 4. *A list of any challenges to developing evidence to support policymaking, including any statutory or other restrictions to accessing relevant data.*
> 5. *A description of the steps the agency will take to accomplish paragraphs (1) and (2).*
> 6. *Any other information as required by guidance issued by the (OMB) director.*

In 2019, OMB issued initial guidance on learning agendas. The guidance generally provided agencies considerable flexibility in determining the structure, scope, scale, and format of the learning agendas. It also outlined an expectation that agencies submit interim agendas in 2020 with complete agendas in 2021, with the 2020 agendas focused on short-term issues. Of note, OMB did not require agencies to align the learning agendas with strategic plans or strategic goals:

> *Agencies should identify priority questions that, when answered, will have the biggest impact on agency functioning and performance. Agencies may, but are not required to, tie their questions to strategic goals and strategic planning. Learning agendas should include both short- and long-term questions of interest to the agency, as well as mission-strategic and agency-operational questions . . . in a balance that emphasizes those of greatest relevance and priority to the agency. In identifying questions, agencies should move beyond high-level, broad questions, even at the enterprise level, to those that have sufficient detail to be answerable and useful.*

Additional guidance to federal agencies provided in OMB Circular A-11 further species OMB's intent for agencies to review their learning agendas annually, but only to update them periodically and only following a formal OMB review process:[35]

> . . . agencies must revisit their learning agendas at least annually and update them as needed to reflect progress toward meeting the agency's original learning goals and objectives, shifting agency priorities, changing contexts within which the agency operates, and emergent needs. Learning agendas should also be updated to incorporate, when available, the results of the activities an agency undertakes to answer priority questions. However, OMB does not expect that agencies will rewrite or draft a new learning agenda annually. Similarly, while part of agency strategic plans, OMB recognizes that the Learning Agenda can be updated independently from those plans . . .

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[35] Part 6, Sections 290.7-10. Washington, D.C.: Office of Management and Budget, July 2020. Accessed at: https://www.whitehouse.gov/wp-content/uploads/2018/06/a11.pdf.

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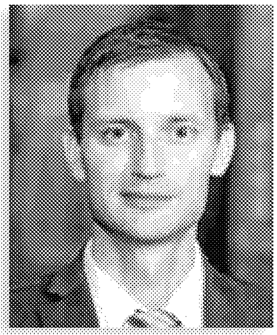

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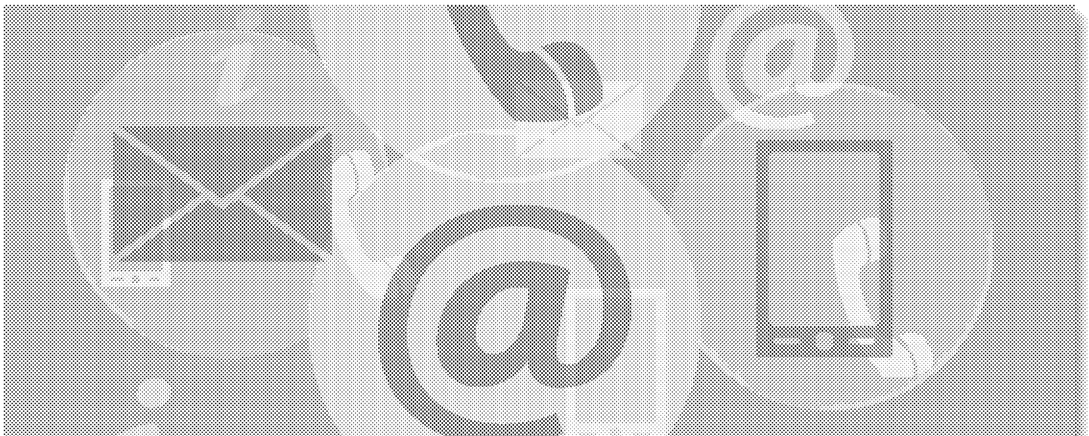

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